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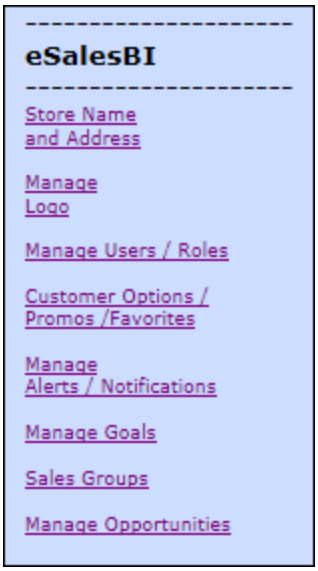
Overview

The Autologue eSales Business Intelligence (BI) Customer Relationship Management (CRM) website is designed to display a variety of information based upon whether you are logged in as an owner/administration, salesman or counterman. Sales dashboards for customers by salesperson as well as by counterman get shown from their login home pages. Alerts and notification parameters are setup by management to alert personnel when customers have a drop off in sales or are returning merchandise more frequently. CRM about the customer information is readily available for viewing which build and strengthens your customer relationship/loyalty by capturing their business and personal information.

eSales BI/CRM Setup

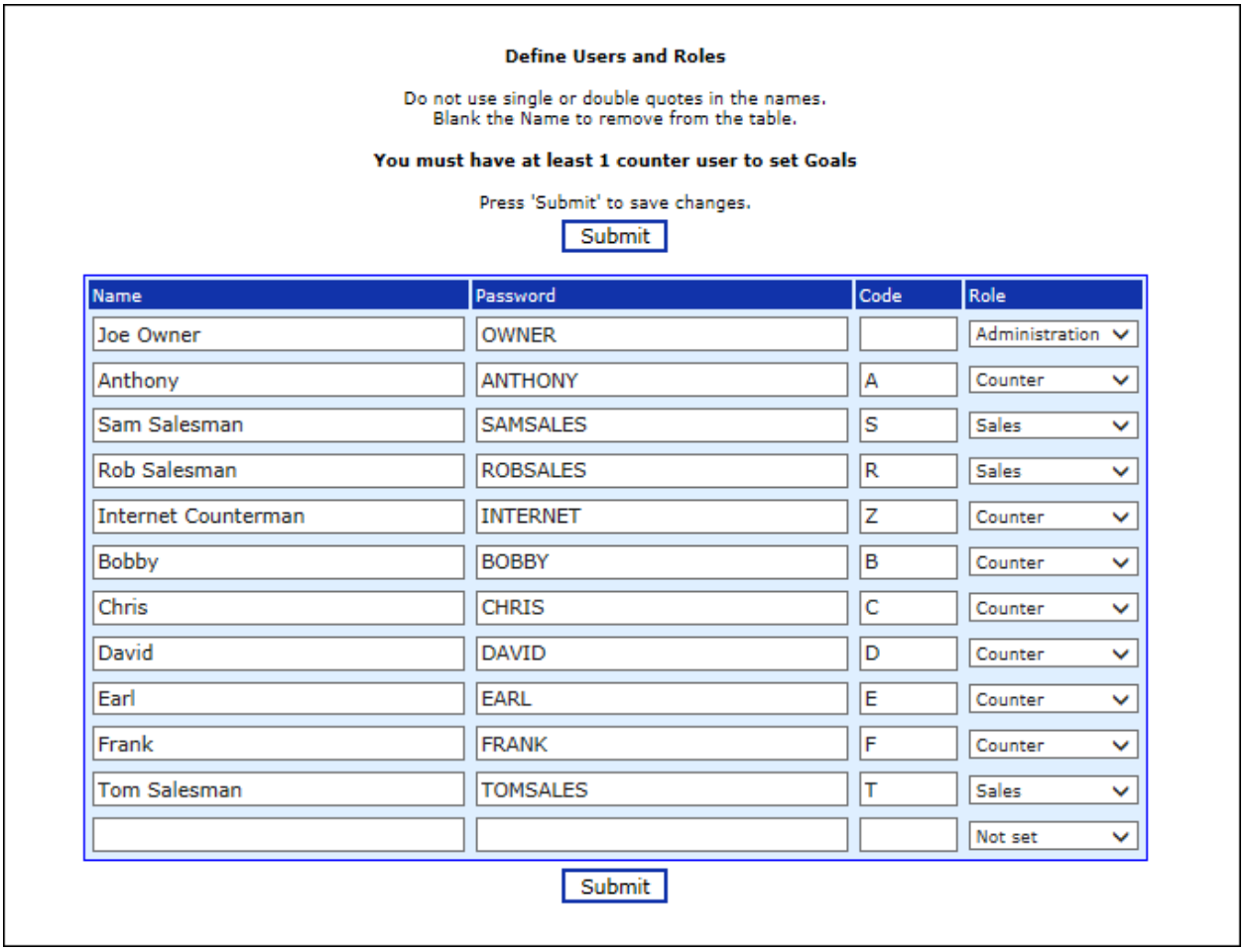
Before the eSales BI/CRM can be used, management will need to perform a few steps within the ePartConnection setup website (http://setup.epartconnection.com). Using your assigned Store ID and password, log into the ePartConnection setup website. The left hand side of the screen will display a list of menu page links available. Look for the following menu options as shown:



Manage Users / Roles

Management will need to first setup all their employees and define their roles which will determine what information they can view when they are logged into the eSales BI/CRM.

- Click on the `Manage Users / Roles` menu link and the following screen will be displayed:



Define Users and Roles

Do not use single or double quotes in the names.
Blank the Name to remove from the table.

You must have at least 1 counter user to set Goals

Press 'Submit' to save changes.

Submit

Name	Password	Code	Role
Joe Owner	OWNER		Administration
Anthony	ANTHONY	A	Counter
Sam Salesman	SAMSALES	S	Sales
Rob Salesman	ROBSALES	R	Sales
Internet Counterman	INTERNET	Z	Counter
Bobby	BOBBY	B	Counter
Chris	CHRIS	C	Counter
David	DAVID	D	Counter
Earl	EARL	E	Counter
Frank	FRANK	F	Counter
Tom Salesman	TOMSALES	T	Sales
			Not set

Submit

Adding A User

- Enter the employee name, their password, a code (counterman or salesman) and select their role (administration, counter, sales) from a drop down selection list by clicking on the down arrow. Click on the `Submit` button to save the entered user name.

☞ **Note: At least one counter user must be setup in order to setup goals in a later step!**

Deleting A User

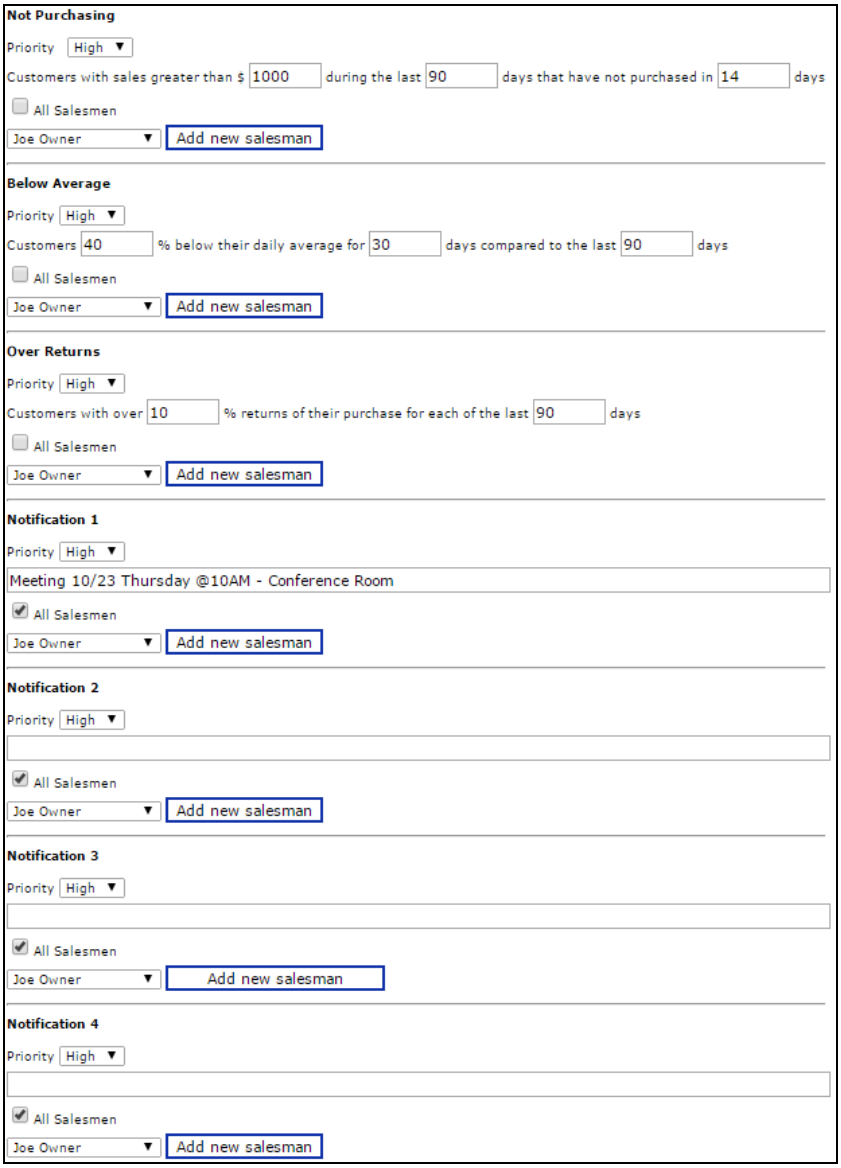
- To delete an existing user shown within the table, double on the user's name to highlight/select it and press the `<Backspace>` or `<Delete>` key to remove the name and then click on the `Submit` button to save the entered user name.

The role that is assigned determines what information the user can view when they are logged in.

Manage Alerts / Notifications

Management can setup specific alerts for customers who haven't made a purchase within a specific number of days, whose sales have dropped below an average based on a specific number of days, or have returns over a specific percentage based on a specific number of days. Up to 4 different notifications can also be setup for reminders of upcoming meetings, gatherings or training sessions scheduled. Each alert/priority defined can have a priority of high, medium or low. This determines which alerts/notifications are displayed first (highest to lowest).

- Click on the `Manage Alerts / Notifications` menu link and the following screen will be displayed:



- Click within the desired section and enter in the specific parameters to setup alerts for and/or the specific notification message and then click on the `Submit` button at the bottom of the page to save the entries. If the All Salesman option is check marked within the section, then it will apply to all salespersons. Otherwise if unchecked, it will only apply to the specific salesperson(s) added.

Manage Opportunities

Management has the ability to direct their customers to specific webpages/websites to promote special events, special pricing, problem solving solutions, etc. These opportunities must be linked to a webpage/website.

- Click on the `Manage Opportunities` menu link and the following screen will be displayed:

New Entry

- To add a new opportunity entry, click within the blank *Description* field and enter in a description of the opportunity. Next, click within the blank *Web Page* field and enter in the web page URL. Click on the `Add` and then click on the `Save Opportunities` buttons to save the new entry.

Rearranging Entries

- Menu items can be rearranged by clicking on the `Up` / `Down` buttons beside each entry.

Editting An Existing Entry

- Clicking on the `Edit` button allows you to modify an existing opportunity entry. Once all the information has been modified, click on the `Update` and then click on the `Save Opportunities` buttons to save the edited entry.

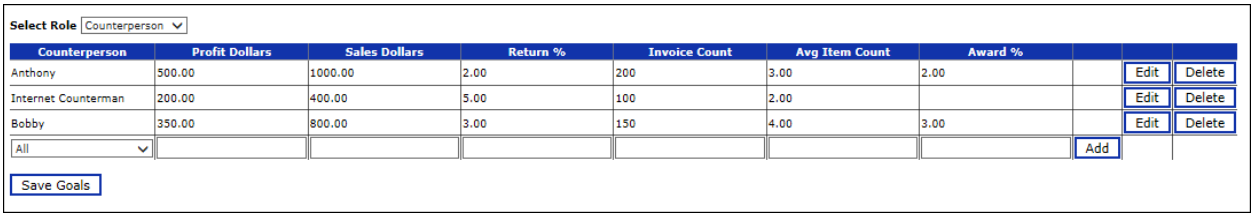
Deleting An Existing Entry

- To delete an existing entry, click on the `Delete` button beside the opportunity menu entry to be removed and then click on the `Save Opportunities` button at the bottom of the page to save the change.

Manage Goals

Management can setup monthly sales goals for each of their counterpersons, salespersons and also for owner (store). These monthly goals will be reflected on the dashboards for each employee type. The yearly goals will be based on the entered monthly goals multiplied by twelve.

- Click on the `Manage Goals` menu link and the following screen will be displayed:



Entering A Counterperson Goal

- To enter a counterperson goal, click on the `Select Role` drop down selection list and click on the `Counterperson` menu selection.

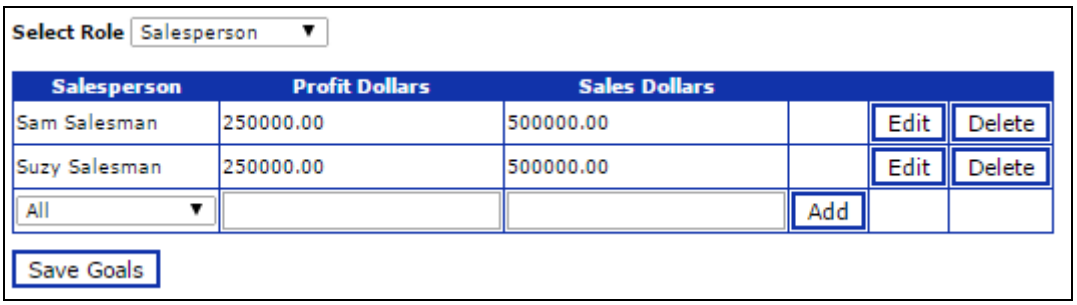
The screen will redraw and display a table with six entry fields for setting up counterperson monthly sales goal information.

- Under the *Counterperson* column heading, click on the field to view a drop down selection list of all counterpersons and click on the specific counterperson to setup the monthly goals for.
- Click within the *Profit Dollars* column heading and enter the monthly goal amount including the decimal.
- Click within the *Sales Dollars* column heading and enter the monthly goal amount including the decimal.
- Click within the *Return %* column heading and enter the monthly goal for return percentage including the decimal.
- Click within the *Invoice Count* column heading and enter the monthly goal for the number of invoices.
- Click within the *Avg Item Count* column heading and enter the monthly goal for the average item count per invoice including the decimal.
- Click within the *Award %* column heading and optionally enter in a commission percentage including the decimal for the counterperson. Commissions are based upon the sales dollars above the monthly sales dollars goal. If no commissions are used, simply enter a zero within the field.
- Once all the information has been entered, click on the `Add` button at the end of the row and the entered sales goal information will be saved.

Entering A Salesperson Goal

- To enter a salesperson goal, click on the `Select Role` drop down selection list and click on the `Salesperson` menu selection.

The screen will redraw and display a table with three entry fields for setting up salesperson monthly sales goal information.

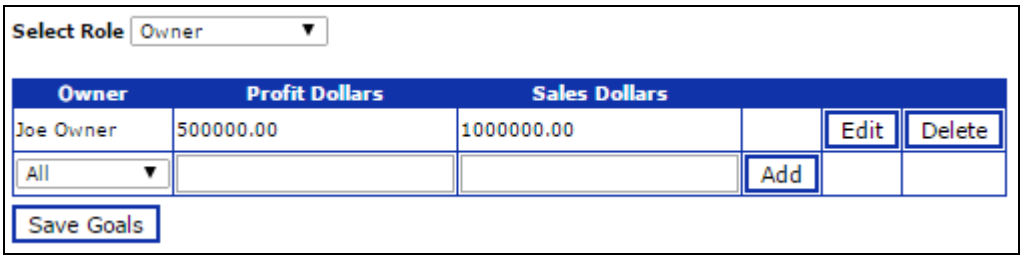


- Under the *Salesperson* column heading, click on the field to view a drop down selection list of all salespersons and click on the specific salesperson to setup the monthly goals for.
- Click within the *Profit Dollars* column heading and enter the monthly goal amount including the decimal.
- Click within the *Sales Dollars* column heading and enter the monthly goal amount including the decimal.
- Once all the information has been entered, click on the `Add` button at the end of the row and the entered sales goal information will be saved.

Entering A Owner Goal

- To enter an owner goal, click on the `Select Role` drop down selection list and click on the `Owner` menu selection.

The screen will redraw and display a table with three entry fields for setting up an owner's monthly sales goal information.



- Under the *Owner* column heading, click on the field to view a drop down selection list of all owners and click on the specific owner to setup the monthly sales goals for.
- Click within the *Profit Dollars* column heading and enter the monthly goal amount including the decimal.
- Click within the *Sales Dollars* column heading and enter the monthly goal amount including the decimal.
- Once all the information has been entered, click on the `Add` button at the end of the row and the entered sales goal information will be saved.

Editting An Existing Goal Entry

- Within any of the role screens, clicking on the `Edit` button allows you to modify an existing entry within the goals table. Once all the information has been modified, click on the `Save Goals` button and the modified information will be saved.

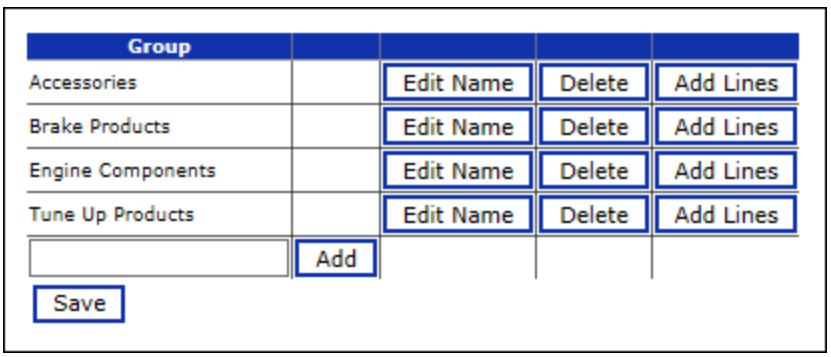
Deleting An Existing Goal Entry

- Within any of the role screens, clicking on the `Delete` button at the end of the row will remove the existing entry within the goals table.

Sales Groups

Management can setup specific sales groups to include specific manufacturer product lines to display sales data for by counterpersons, salespersons and also for owner (store).

- Click on the `Sales Groups` menu link and the following screen will be displayed:



Adding A New Sales Group Label

- To add a new sales group label entry, click within the blank field to the left of the `Add` button. Enter in a sales group description and then click on the `Add` button. Click on the `Save` button at the bottom of the page to save the change.

Editting A Sales Group Name

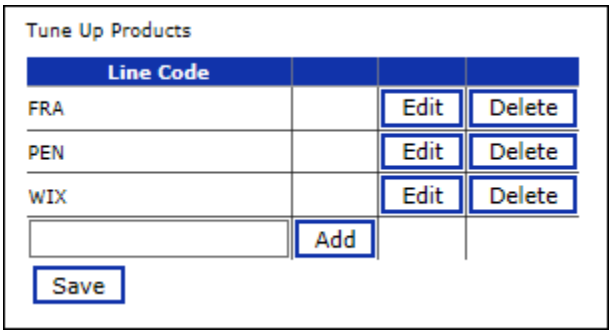
- To edit an existing sales group name entry, click on the `Edit Name` button to the right of the Sales Group name. Click within the Sales Group field, enter the desired changes and then click on the `Update` button. Click on the `Save` button at the bottom of the page to save the change.

Deleting An Existing Sales Group

- To delete an existing sales group entry, click on the `Delete` button to the right of the Sales Group name and the Sales Group will be removed from the table. Click on the `Save` button at the bottom of the page to save the change.

Setting Up Codes For A Sales Group

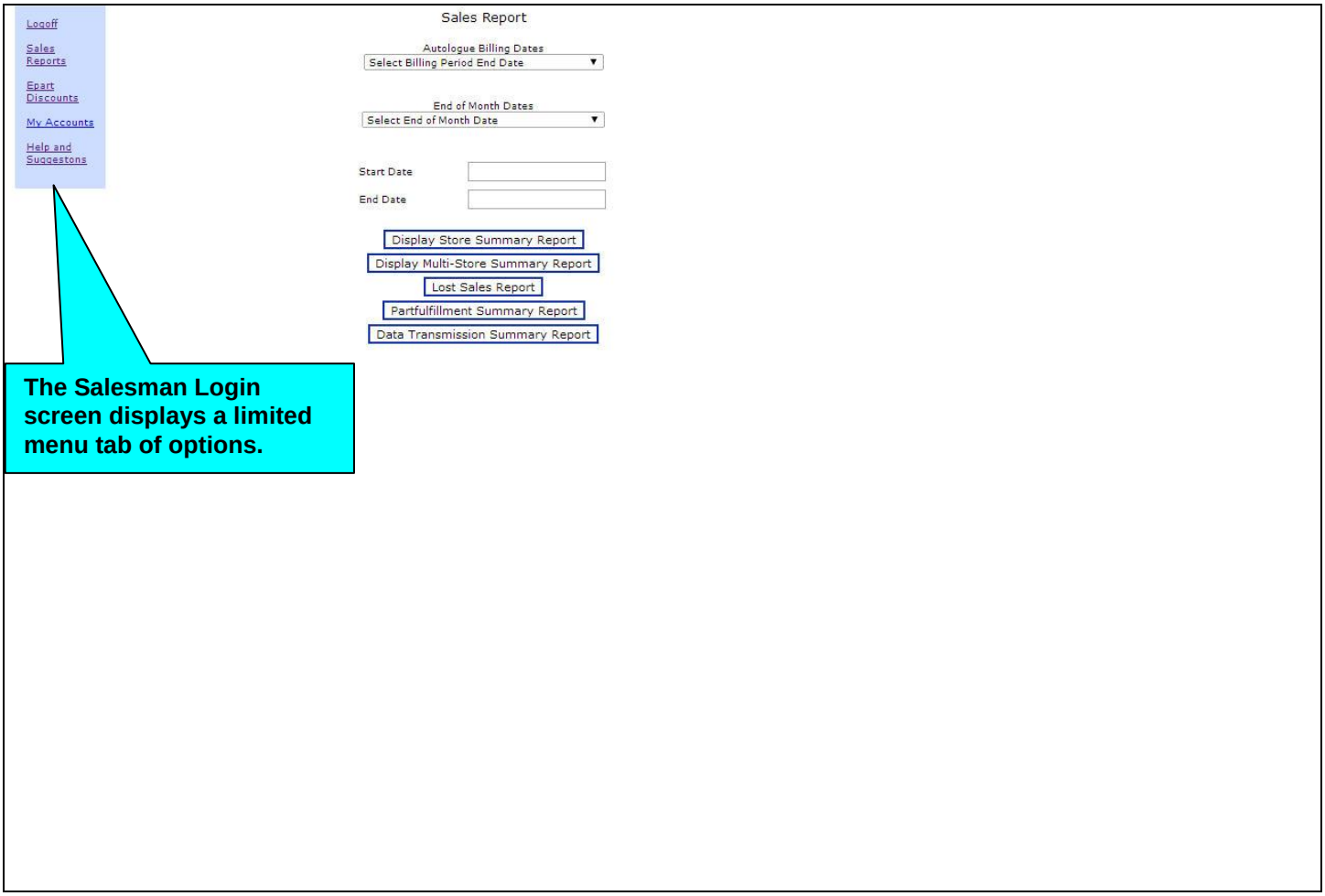
- To setup the specific line codes for a sales group, click on the `Add Lines` button to the right of the Sales Group. The screen will now display a table of line codes that have been assigned. To add a new line code, click within the blank Line Code field column, enter in the desired line code and then click on the `Add` button. Click on the `Save` button at the bottom of the page to save the change. Line codes can be edited or deleted using the `Edit` or `Delete` buttons.



Login To ePartConnection Setup As A Salesman

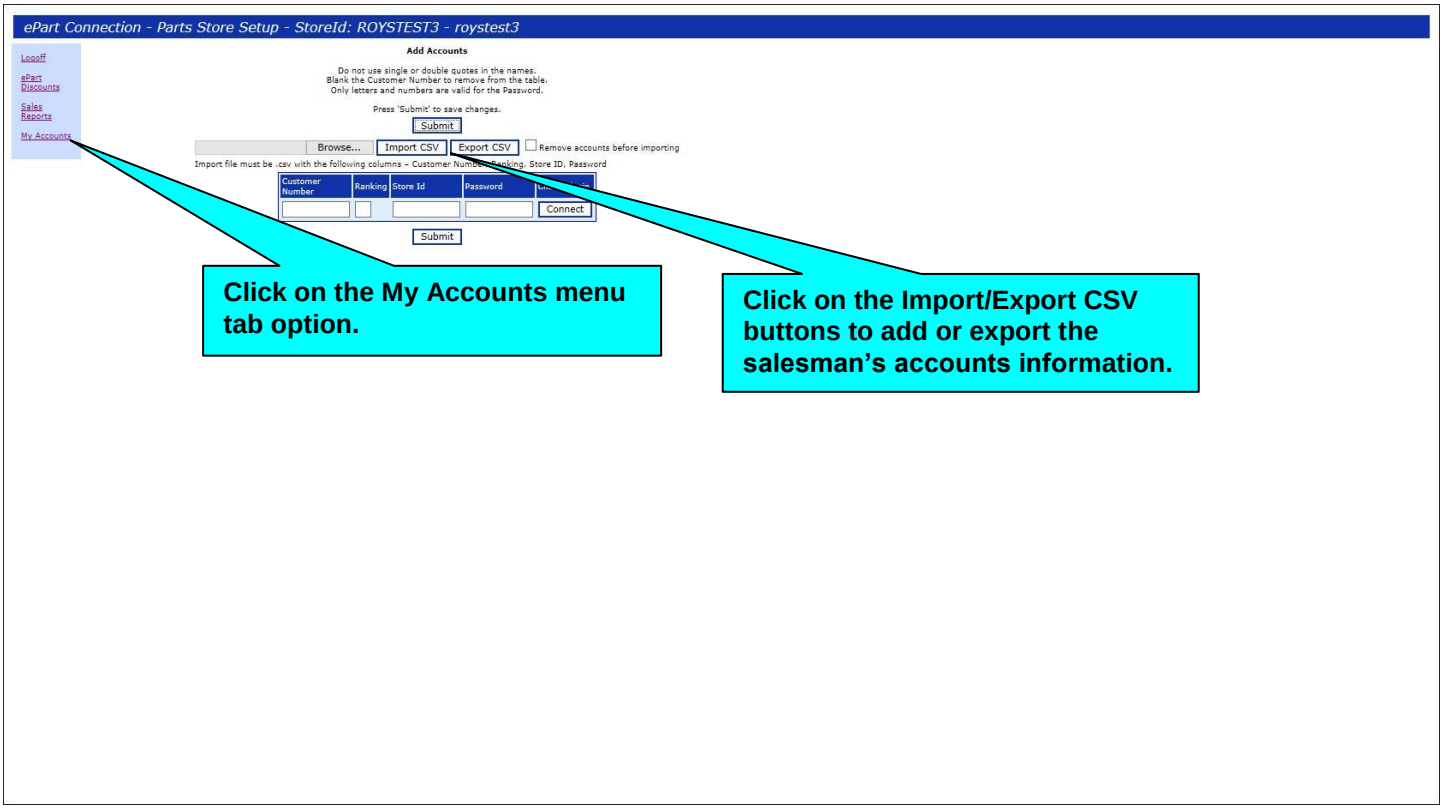
The salesman will now log into the ePartConnection Setup website, using the Store ID and "salesman" password that was setup in the *Manage Users / Roles* step.

A *Sales Report* screen with a limited menu tab of options will now be displayed as shown:



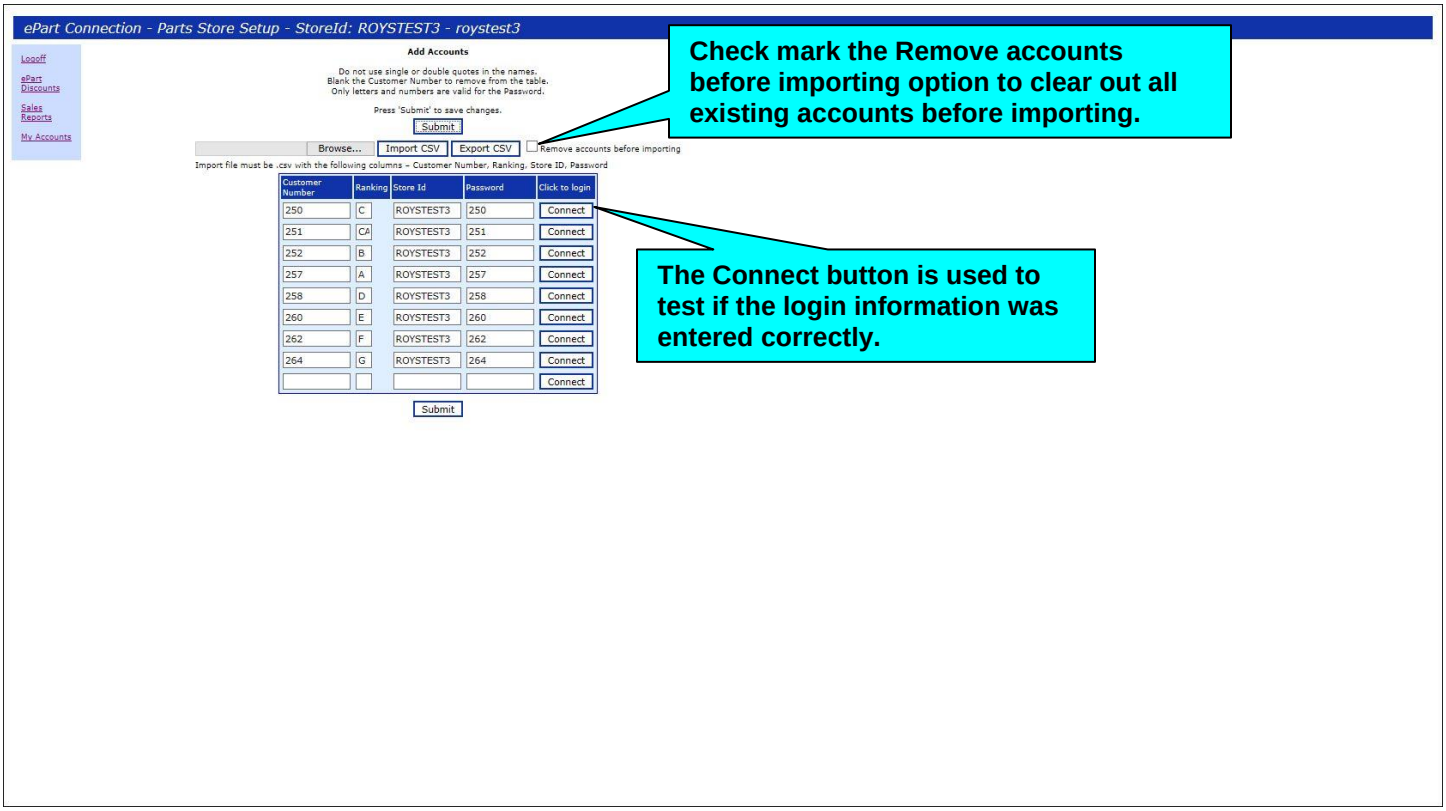
Setting Up The Salesman Accounts

- Click on the *My Accounts* menu link and the following screen will be displayed:


ePart Connection - Parts Store Setup - StoreId: ROYSTEST3 - roystest3
Logoff
ePart Discounts
Sales Reports
My Accounts
Add Accounts
Do not use single or double quotes in the names.
Blank the Customer Number to remove from the table.
Only letters and numbers are valid for the Password.
Press 'Submit' to save changes.
Submit
Browse...
Import CSV
Export CSV
Remove accounts before importing
Import file must be .csv with the following columns - Customer Number, Ranking, Store ID, Password
Customer Number
Ranking
Store Id
Password
Connect
Submit
Click on the My Accounts menu tab option.
Click on the Import/Export CSV buttons to add or export the salesman's accounts information.

Manually Adding Accounts

- Within the *Add Accounts* screen, click within the `Customer Number` field and enter the customer number for the account being added and press the `<Tab>` key.
- With the cursor positioned within the `Ranking` field, enter in a ranking code (A-Z or 0-9) and press the `<Tab>` key.
- With the cursor positioned within the `Store Id` field, enter in your stores ePartConnection store ID and press the `<Tab>` key.
- With the cursor positioned within the `Password` field, enter in the password for the customer number entered and click on the `Submit` button to save the entered information.
- Click on the `Connect` button to test if the login connects correctly. If the entered account information is correct, a new browser window will pop up with the customer automatically logged into the ePartConnection website. If the information entered was incorrect, a new browser window will pop up but the ePartConnection login screen will be displayed and the customer account will NOT be automatically logged in.


ePart Connection - Parts Store Setup - StoreId: ROYSTEST3 - roystest3
Logoff
ePart Discounts
Sales Reports
My Accounts
Add Accounts
Do not use single or double quotes in the names.
Blank the Customer Number to remove from the table.
Only letters and numbers are valid for the Password.
Press 'Submit' to save changes.
Submit
Browse...
Import CSV
Export CSV
Remove accounts before importing
Import file must be .csv with the following columns – Customer Number, Ranking, Store ID, Password
Customer Number
Ranking
Store Id
Password
Click to login
Connect
Submit
Check mark the Remove accounts before importing option to clear out all existing accounts before importing.
The Connect button is used to test if the login information was entered correctly.

Importing/Exporting Salesman's Accounts

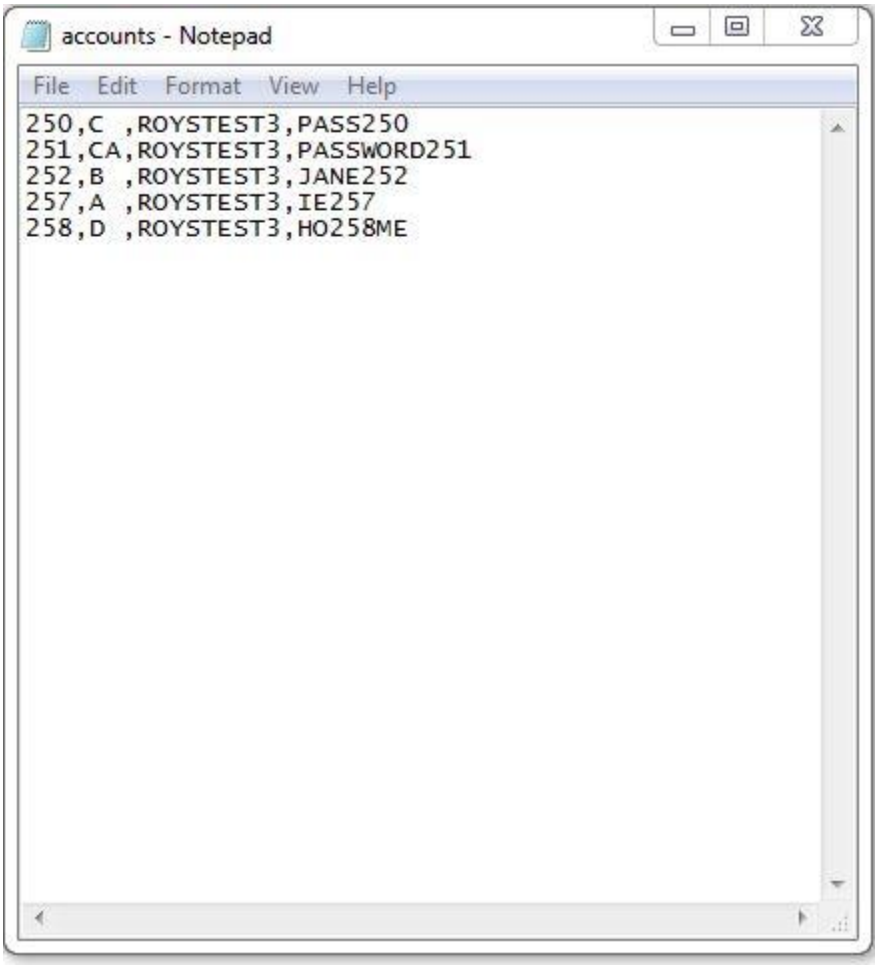
- The salesman's accounts can also be imported into the *Add Accounts* screen by clicking on the `Browse…` button and selecting the ASCII CSV (comma separated value) file and then clicking on the `Import CSV` button. The CSV file should contain the following fields of information: Customer Number, Ranking Code, ePart Store ID, Password.

Note: By default, when importing account information, the information is added to/updates the existing salesman's accounts table information. If you want to replace the existing table information, click on the check box to the left of the `Remove accounts before importing` menu option field to check mark the field and then perform the importing as previously described.

- The customer accounts information can also be exported from this screen by clicking on the `Export CSV` button. An *accounts.csv* ASCII CSV file will be automatically downloaded and saved into the users download folder. The file will contain the following fields of information: Customer Number, Ranking Code, ePart Store ID, Password.

Note: AConneX users must enter customers into the *appropriate store's* (the store in "Store ID" column) *Trading Partners* table within the *ePartConnection Setup*.

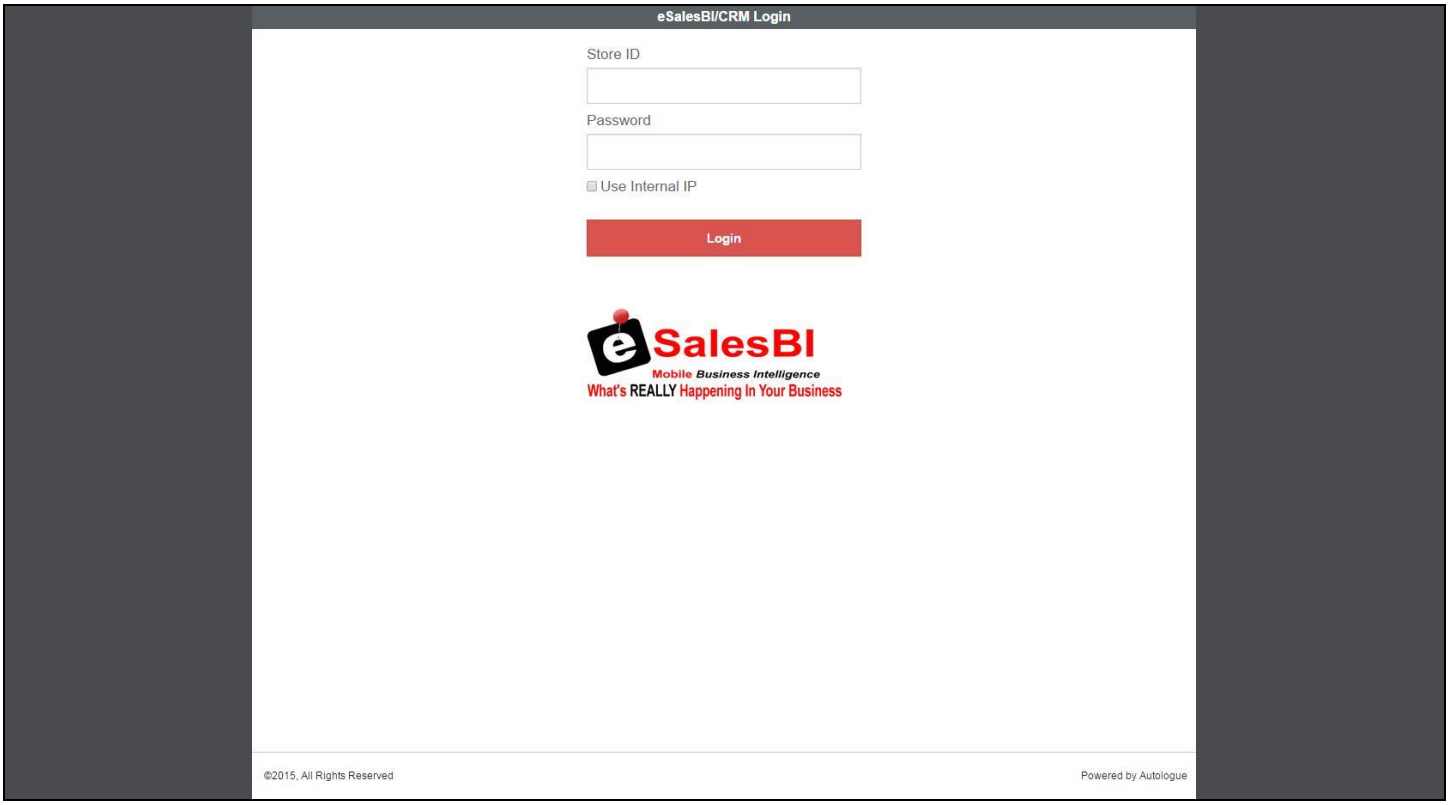
Below is a sample of an ASCII CSV *accounts.csv* file:



- The salesman would then log out of the *ePartConnection Setup* website by clicking on the `Logoff` menu tab button.

Login To eSales BI/CRM

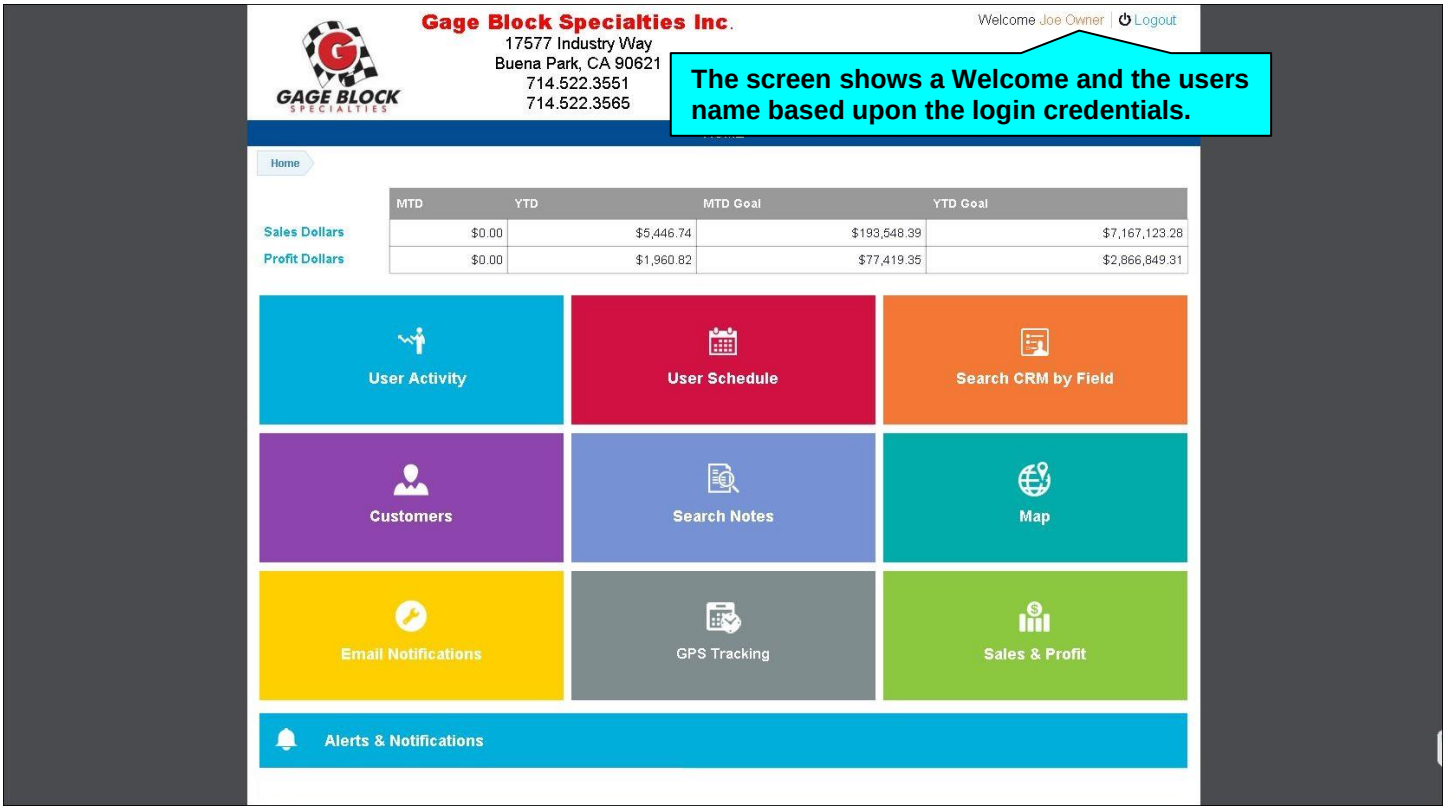
Begin by logging into the Autologue eSales BI/CRM website (http://autobi.autologue.com/crmowner/login.aspx), using the Store ID and password assigned to you and then clicking on the `Login` button.



There are 3 different types of information screens that get displayed based upon the users login credentials they entered when logging in. One is for the owner/administration, and there are also ones for the salesman and the counterman. Each will be shown and discussed below in their respective sections.

Owner Login Screen

When an owner has logged in using their owner password, the following screen will be displayed:

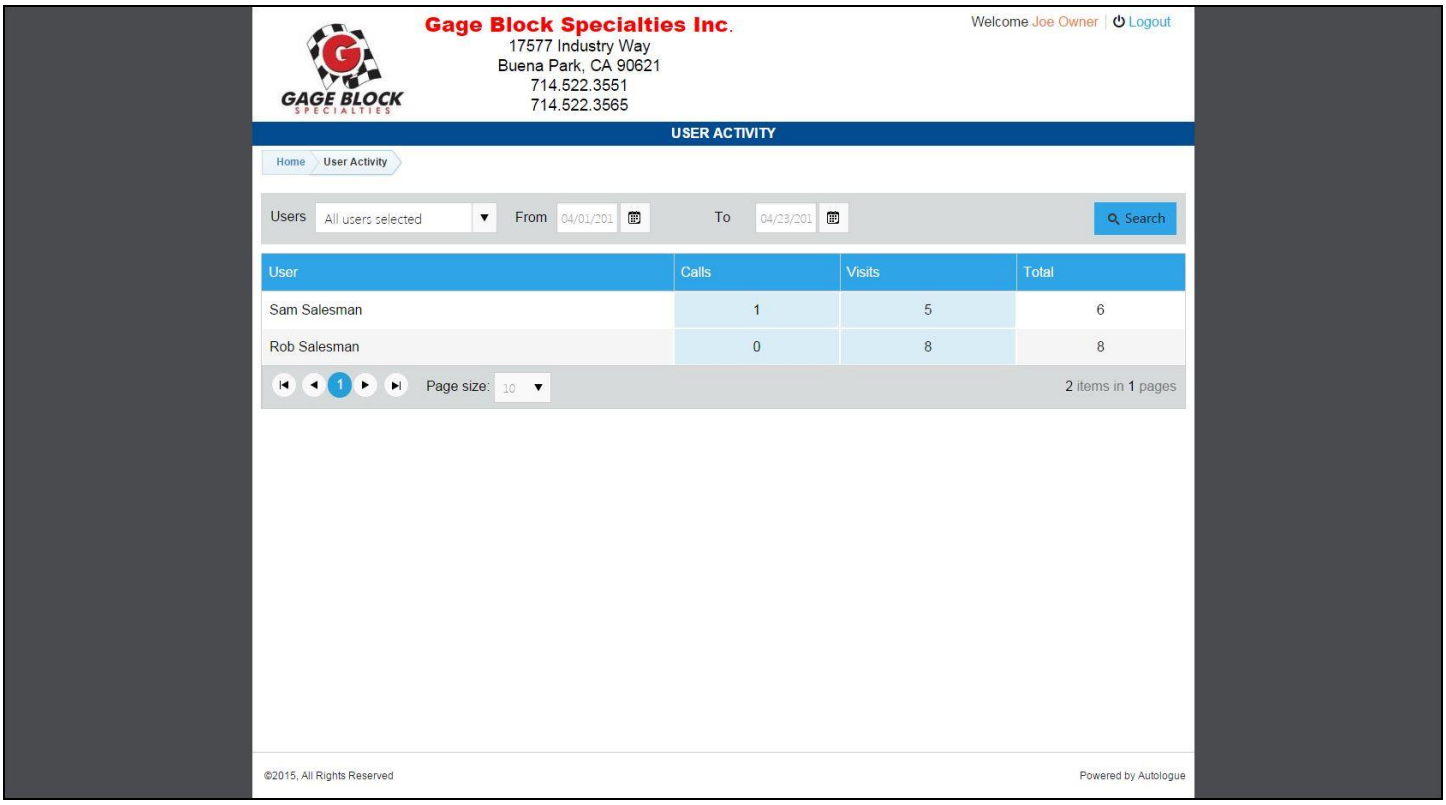


This is the owner's home screen. Here the owner has the ability to perform the following:

• User Activity – View a summary of user's scheduled calls/visits by date selection	• User Schedule – View all users scheduled calls/visits on the calendar by date selection
• Search CRM Information By Field – Identify specific customers using search criteria from CRM information	• Display a list of all customers
• Search Notes – Search notes by user and/or date range	• View a map plotting the locations of the customers who have scheduled appointments for the day
• Setup Email Notifications & Business Hours For Scheduler – Create internal email recipient list, identify administrator users and set business hours for scheduler	• View a salespersons in & out times for scheduled appointments (GPS Tracking)
• View a salespersons actual driving route plotted on a map (GPS Tracking)	• View Sales & Profit
• View Alerts & Notifications	

User Activity

- To view a user's activity (calls/visits), click on the `User Activity` button and the following screen will be displayed:



By default, all Users are selected and the From/To activity dates will be from the beginning of the current month through the current day. If there were any calls or visits scheduled for users within the current month, each user will be listed and as well as the number of calls and visits they performed within the date period shown.

Changing The Search Criteria

- To report only on specific users within the *User Activity* screen, click on the down arrow button at the end of the `Users` field and check mark only the specific users you want to report on from the drop down selection list.
- To change the date range to show activity for, click within the `From/To` fields and enter in the specific dates. Optionally you can click on the calendar buttons to the right of the `From/To` fields and then click on the specific dates to select the date.
- Now click on the `Search` button and the screen will then redraw the screen with the new report results.

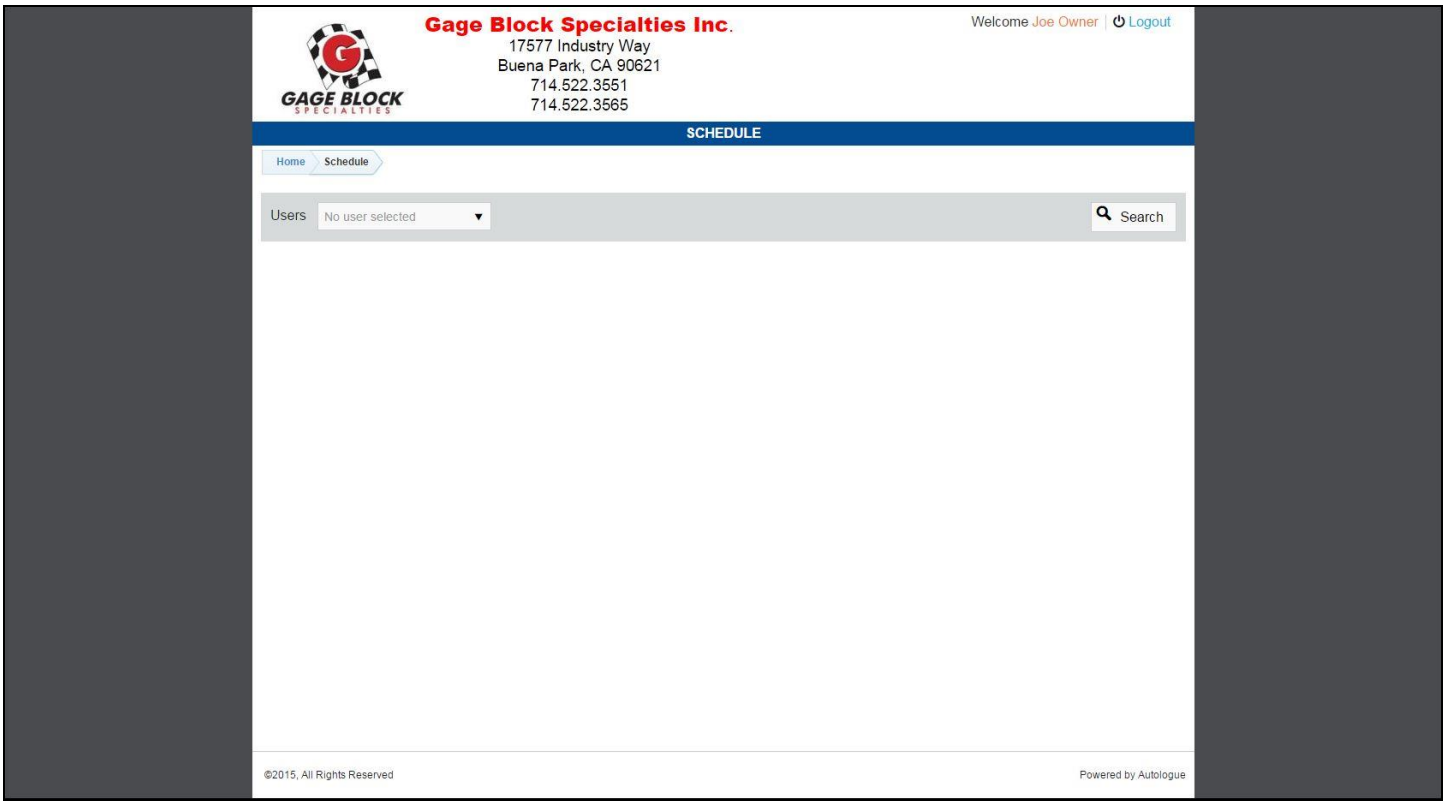
Viewing Calls/Visits Details

- With the screen displaying the number of calls/visits for each user, you have the ability to "drill down" and view the details of each call or visit by clicking on the cell that shows the number of calls/visits.
- The screen will now show a list of the customers and the number of times they were called/visited.
- To view the details of the call/visit for a customer, click on the cell that shows the number of calls/visits.

- The screen will now display the details of the visit/call along with any additional note that was added.

User Schedule

- From the owners home screen, to view a schedule for a specific user, click on the `User Schedule` button and the following screen will be displayed:



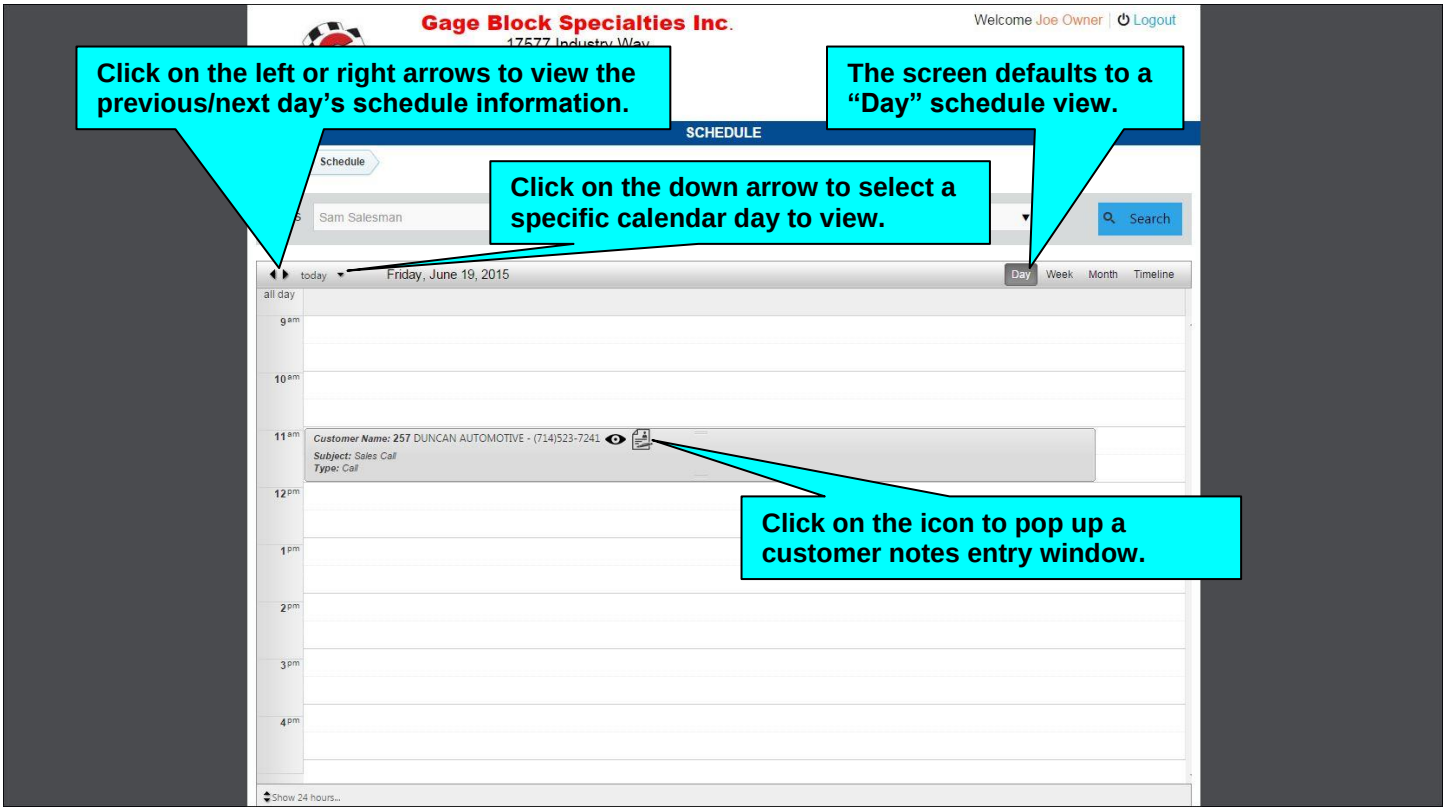
By default, no users are selected and the schedule screen will therefore be blank.

Selecting A User To View

- You have the ability to select a specific user to view schedule information for by clicking on the down arrow button at the end of the `Users` field and then clicking on the specific user you want to report on from the drop down selection list.
- Now click on the `Search` button and the screen will then redraw the screen with the schedule information for the selected user.

Day Schedule View

By default, the screen will display a daily schedule view as shown:



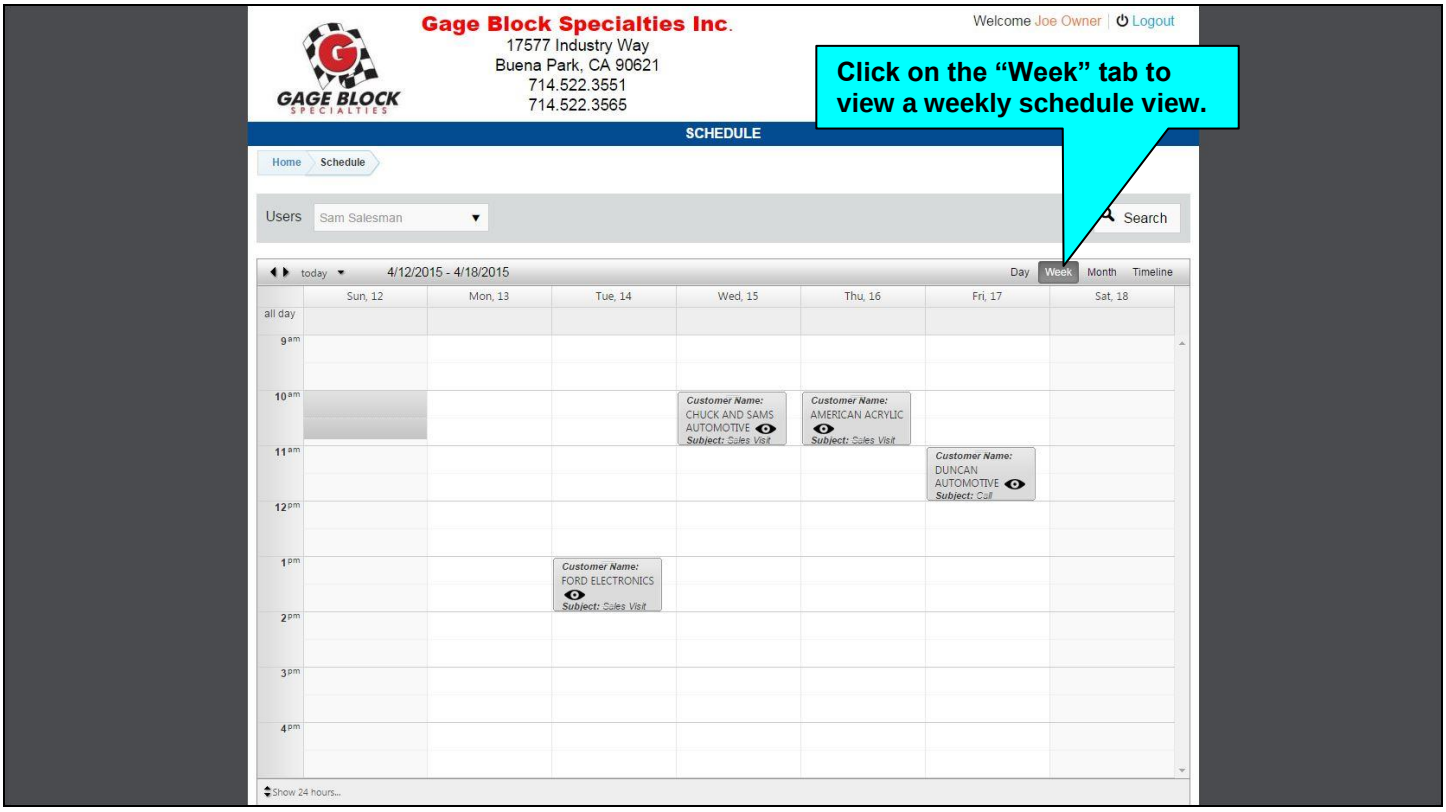
The day schedule view shows all appointments only for the specific day.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next day's schedule information. Click on the down arrow button to select a specific calendar day to view.

Week Schedule View

- To have the screen display a weekly schedule view, position the cursor over the `Week` column tab and click on it.

The screen will be redrawn as shown:



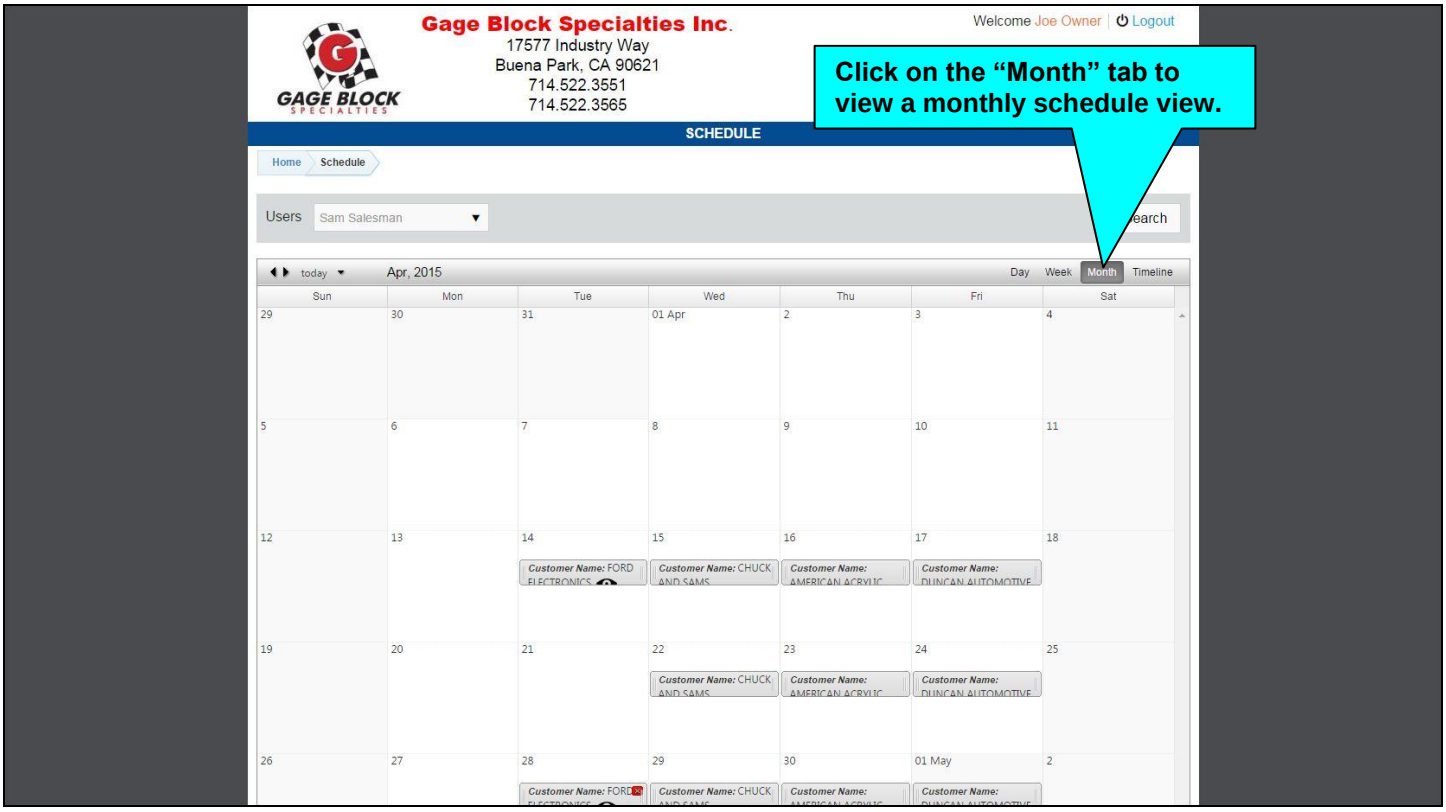
The weekly schedule view shows all appointments only for the current week.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next week's schedule information.

Month Schedule View

- To have the screen display a monthly schedule view, position the cursor over the `Month` column tab and click on it.

The screen will be redrawn as shown:



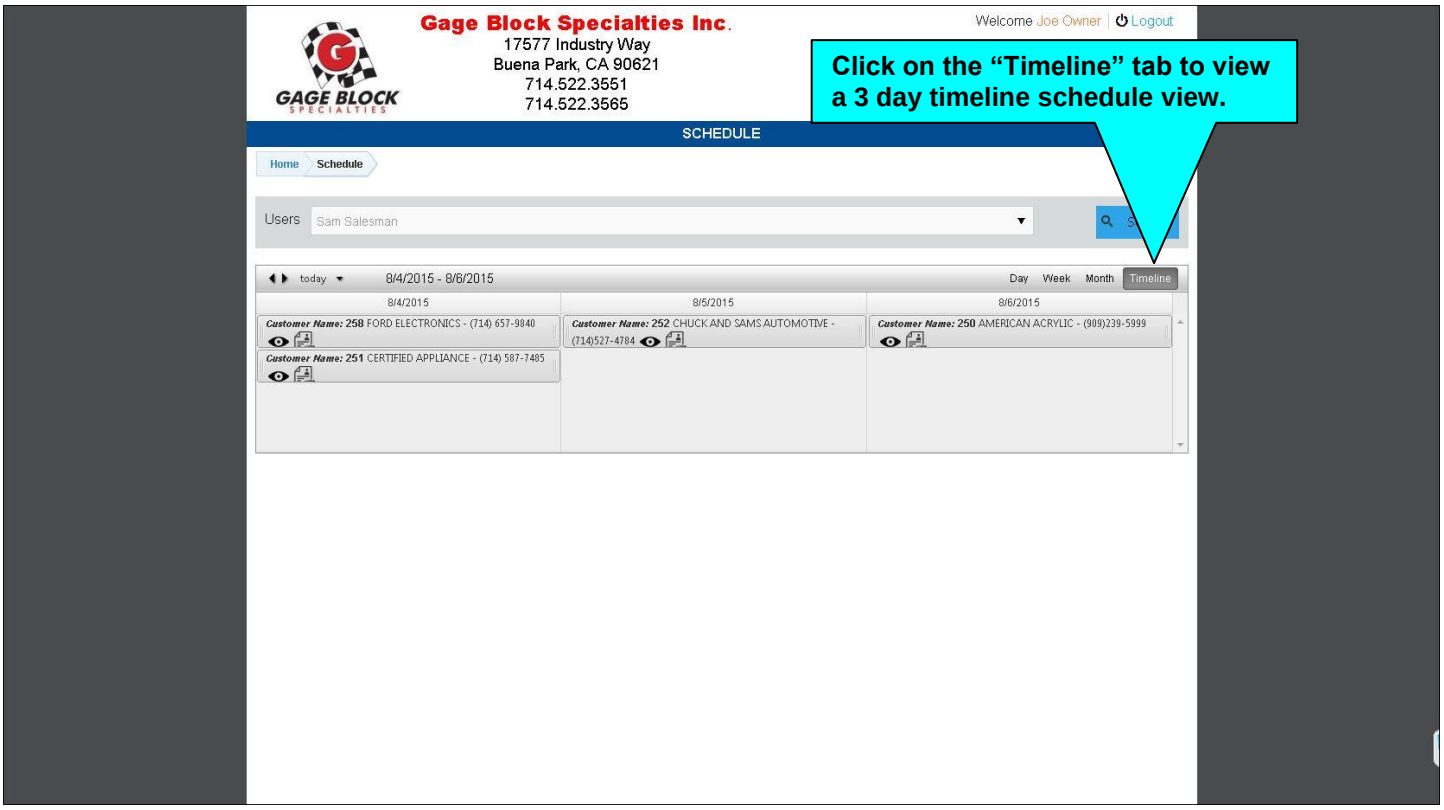
The monthly schedule view shows all appointments only for the current month.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next month's schedule information.

Timeline Schedule View

- To have the screen display a three day timeline schedule view, position the cursor over the `Timeline` column tab and click on it.

The screen will be redrawn as shown:



The timeline schedule view shows all appointments only for a 3 day period.

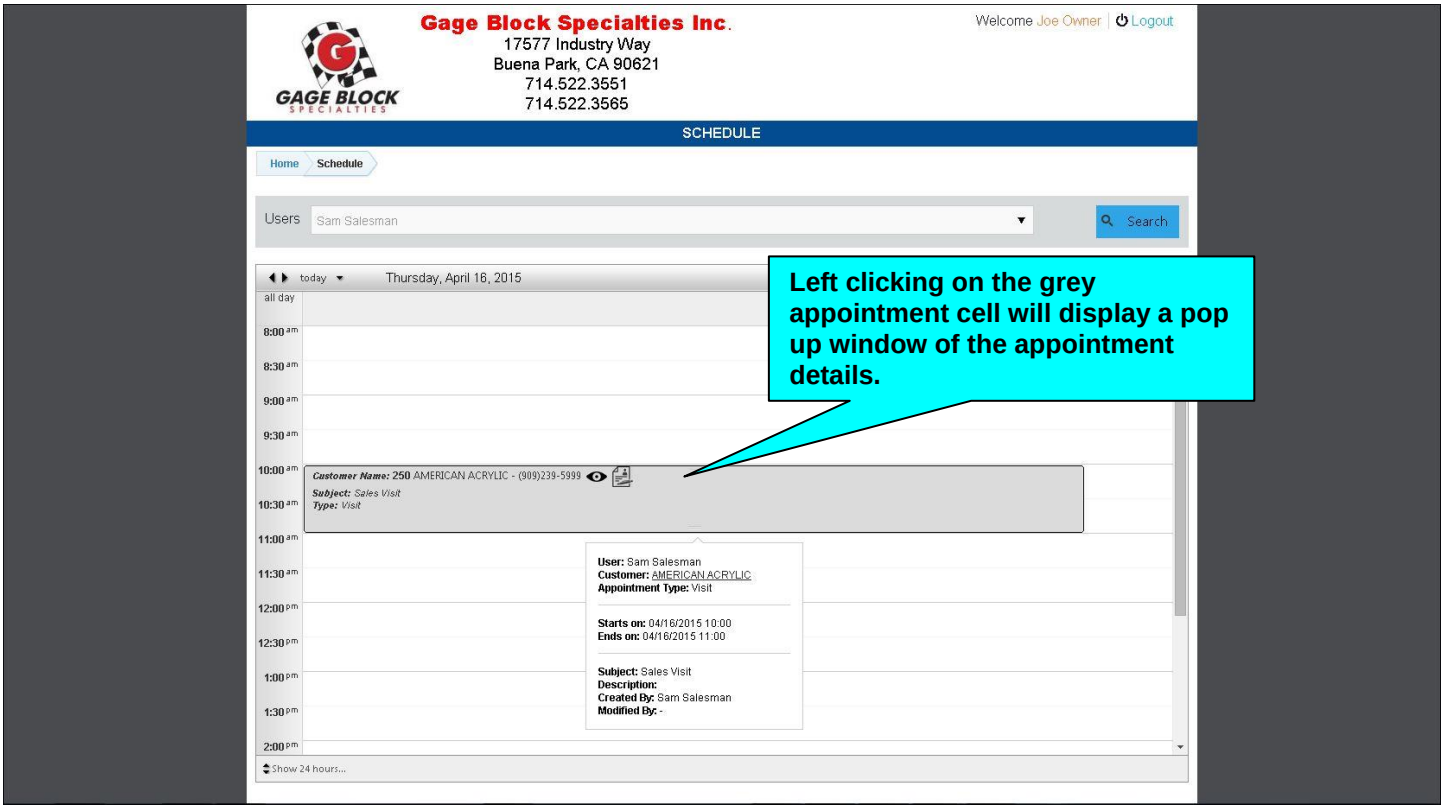
- Click on the left or right arrow buttons of the grey heading bar to view the previous or next day's schedule information.

Viewing Appointment Details

- With the schedule screen displaying appointments in any of the four different views (day, week, month, timeline), you have the ability to view the appointment details by placing the mouse pointer over the grey appointment cell (anywhere except the customer name) and left clicking on it.

☞ **<u>Note:</u> Be sure the mouse pointer stays as an arrow before clicking. If the pointer turns into a finger pointer (☝), it will not display a pop up window of the appointment details!**

The appointment details will pop up on the screen as shown:

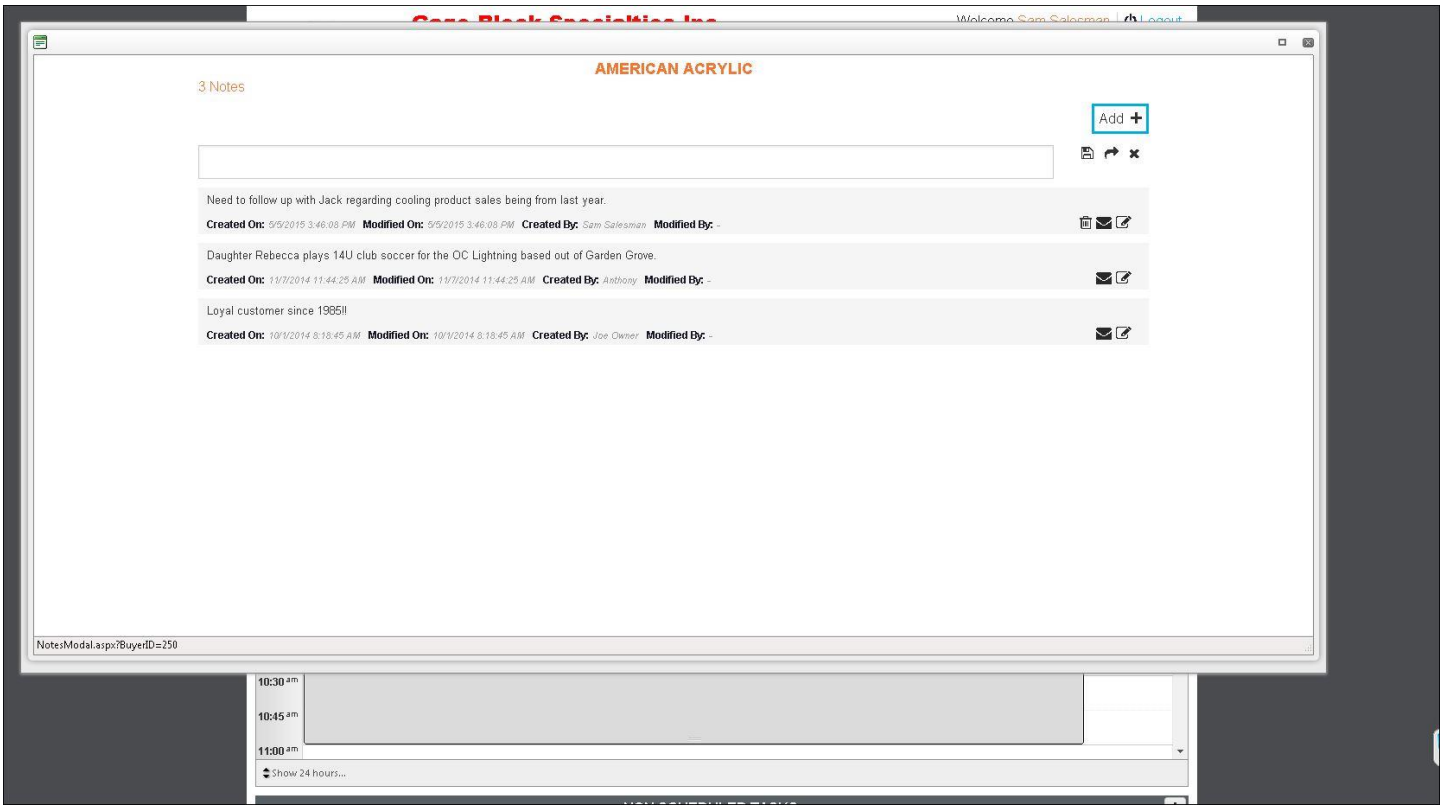


- To remove the appointment details pop up window, click anywhere else on the screen.

Entering A Customer Note From An Appointment

- With the schedule screen displaying appointments in the day view, you have the ability to enter a customer note by placing the mouse pointer over the customer notes icon (🗎) and left clicking on it.

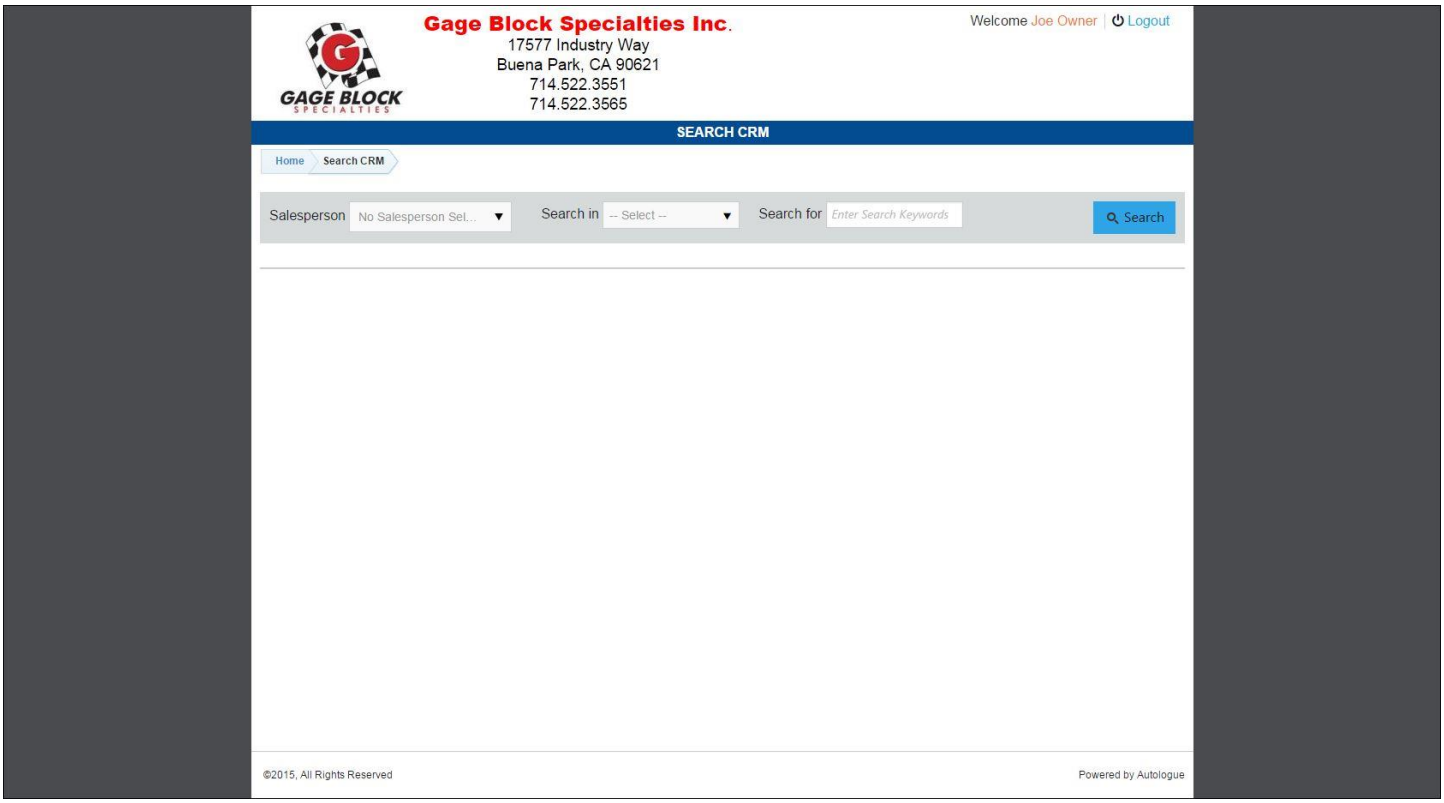
A customer note pop up window will now be displayed on the screen and will display any note entry information for the customer as shown:


AMERICAN ACRYLIC
3 Notes
Add +
Need to follow up with Jack regarding cooling product sales being from last year.
Created On: 5/5/2015 3:46:08 PM Modified On: 5/5/2015 3:46:08 PM Created By: Sam Salesman Modified By: -
Daughter Rebecca plays 14U club soccer for the OC Lightning based out of Garden Grove.
Created On: 11/7/2014 11:44:25 AM Modified On: 11/7/2014 11:44:25 AM Created By: Anthony Modified By: -
Loyal customer since 1985!!
Created On: 10/1/2014 8:18:45 AM Modified On: 10/1/2014 8:18:45 AM Created By: Joe Owner Modified By: -
NotesModal.aspx?BuyerID=250
10:30 am
10:45 am
11:00 am
Show 24 hours...

- A note can be added by clicking on the (Add ✚) button, then clicking within the blank field that is now displayed above all the previous notes information, enter in the new notes information and then clicking on the Save (🖬) icon to save the entered note. You also have the option to both save the entered note and have it emailed by clicking on the Save and Email (➦) icon.
- Existing note entries display the actual note, the creation/last modification dates, and the names of who created/modified the note entry. An existing note entry can be modified by clicking on the edit note (🖉) icon. A note can be emailed by clicking on the envelope (✉) icon. Clicking on the trash can (🗑) icon will delete the note entry.
- Click on the close (☒) icon to close the customer notes pop up window and you will be returned to the schedule screen.

Search CRM By Field

- From the owners home screen, to access customer reports for all or just a specific salesperson, click on the `Search CRM by Field` button and the following screen will be displayed:



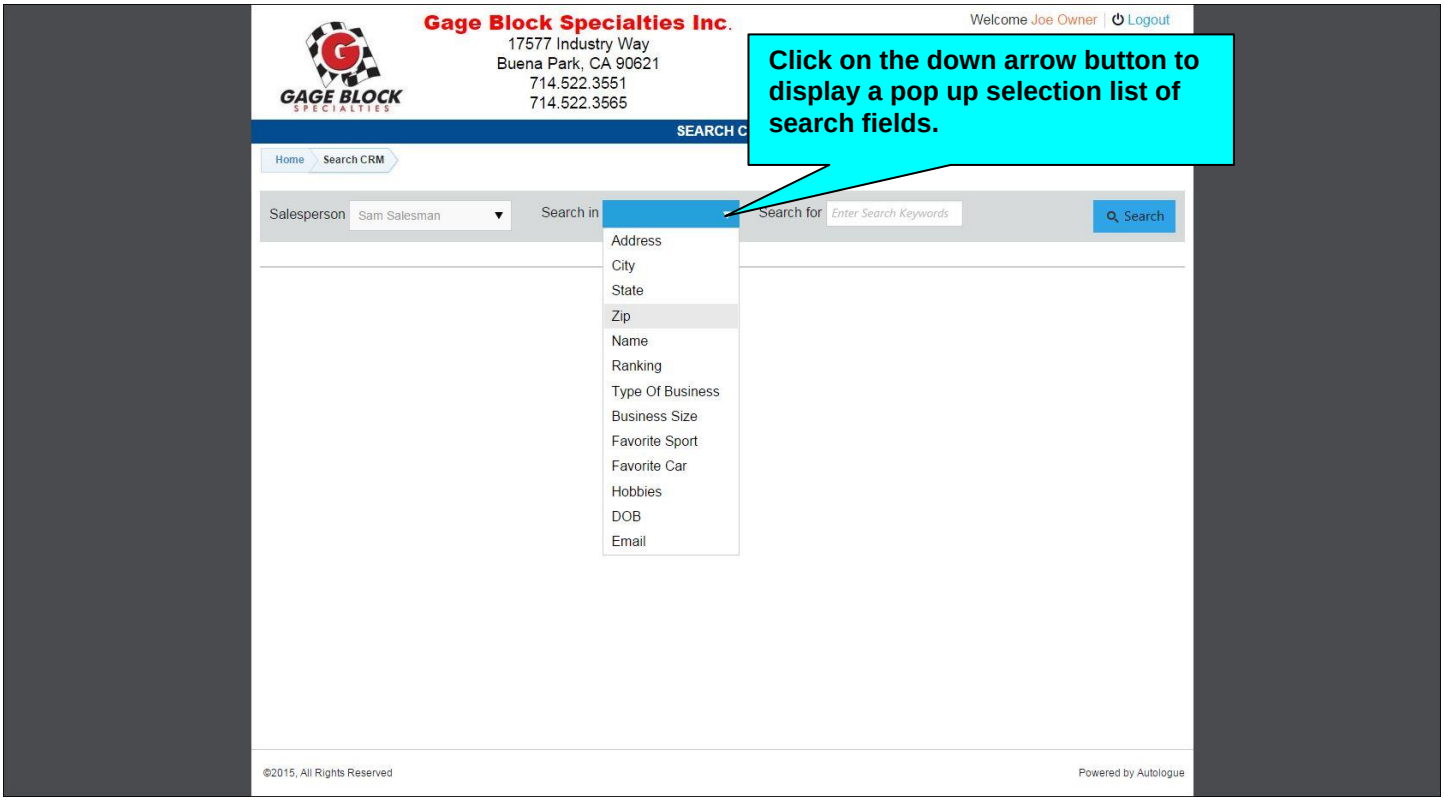
By default, no salespersons are selected and the *Search CRM* screen will therefore be blank. The *Search CRM* screen allows you to search for customers (which includes the owners/employees and family) by a single field entry such as favorite sport/car, birthday, hobbies, state, etc. for a single or multiple salespersons.

Selecting Salespersons To View

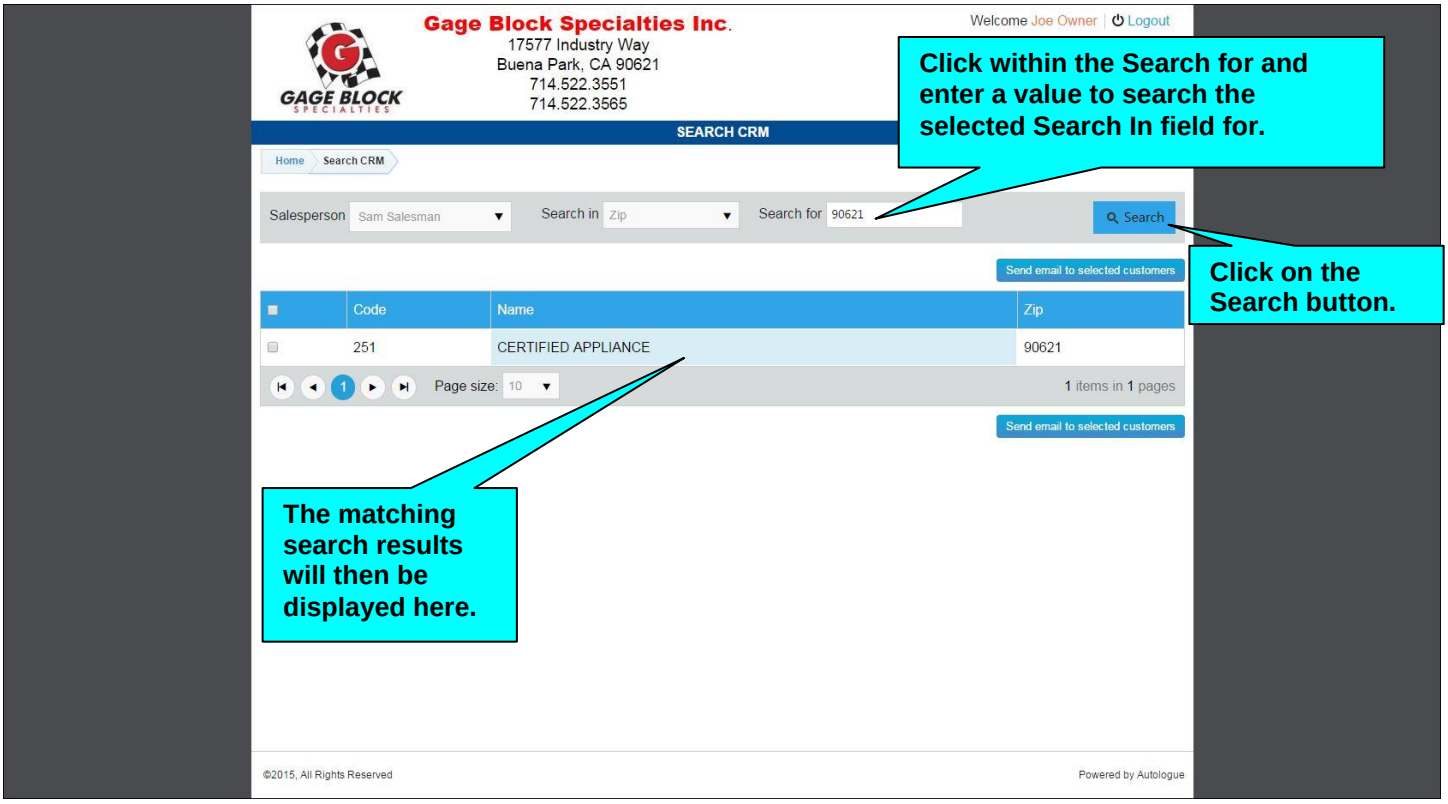
- You have the ability to select one or more salespersons to search customer information for by clicking on the down arrow button at the end of the `Salesperson` field and check mark only the specific salesperson's you want to report on from the drop down selection list.

Selecting A Search Field & What To Search For

- You have the ability to select one customer record field to search customer information for by clicking on the down arrow button at the end of the `Search In` field. Click on any one of the fields available from the drop down selection list that you want the search based upon.

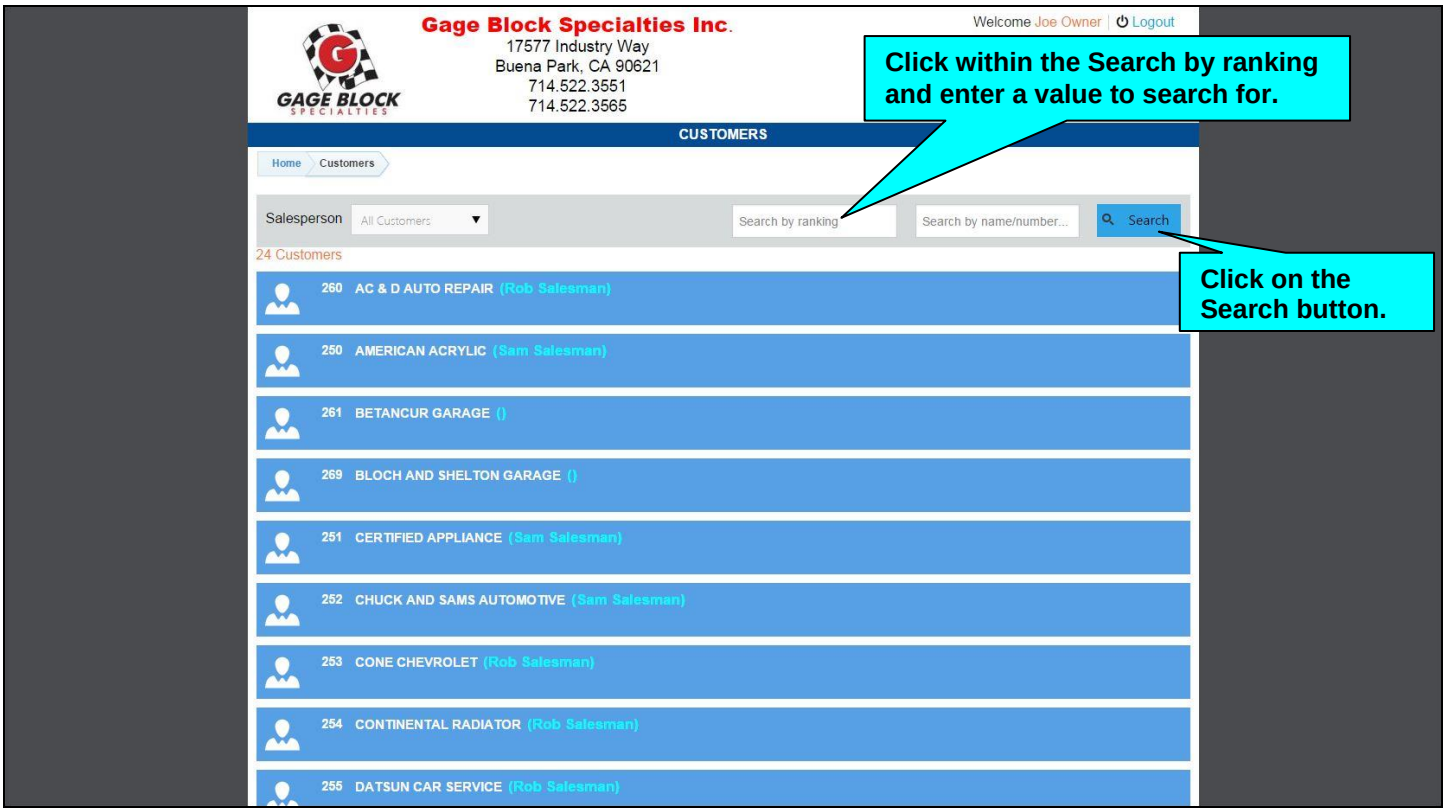


- Once a `Search In` field has been selected, click within the `Search for` field and enter in a specific value to be searched for and then click on the `Search` button and the screen will then redraw the screen with the matching customers that have matching data. Note: The search value is not case sensitive and can be substring of a field value. Example, entering "full" will match the city of "Fullerton". It searches all CRM information for customers, which includes the owners/employees and family fields.


Gage Block Specialties Inc.
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565
Welcome Joe Owner | Logout
SEARCH CRM
Home
Search CRM
Salesperson
Sam Salesman
Search in
Zip
Search for
90621
Search
Send email to selected customers
Code
Name
Zip
251
CERTIFIED APPLIANCE
90621
Page size:
10
1 items in 1 pages
Send email to selected customers
©2015, All Rights Reserved
Powered by Autologue
Click within the Search for and enter a value to search the selected Search In field for.
Click on the Search button.
The matching search results will then be displayed here.

Customers

- From the owners home screen, to access all customers or just customers for selected salespersons, click on the `Customers` button and the following screen will be displayed:



By default, all customers are displayed on the screen. Besides each customer name that is listed will be their assigned salesperson (shown in parenthesis) and their assigned Ranking code (shown in yellow).

Selecting Salespersons To View

- You have the ability to select one or more salespersons to view customers for by clicking on the down arrow button at the end of the `Salesperson` field and check mark only the specific salesperson's you want to report on from the drop down selection list.

Search By Ranking

Within the *Customers* screen, you have the ability to search for customers by a specific ranking code.

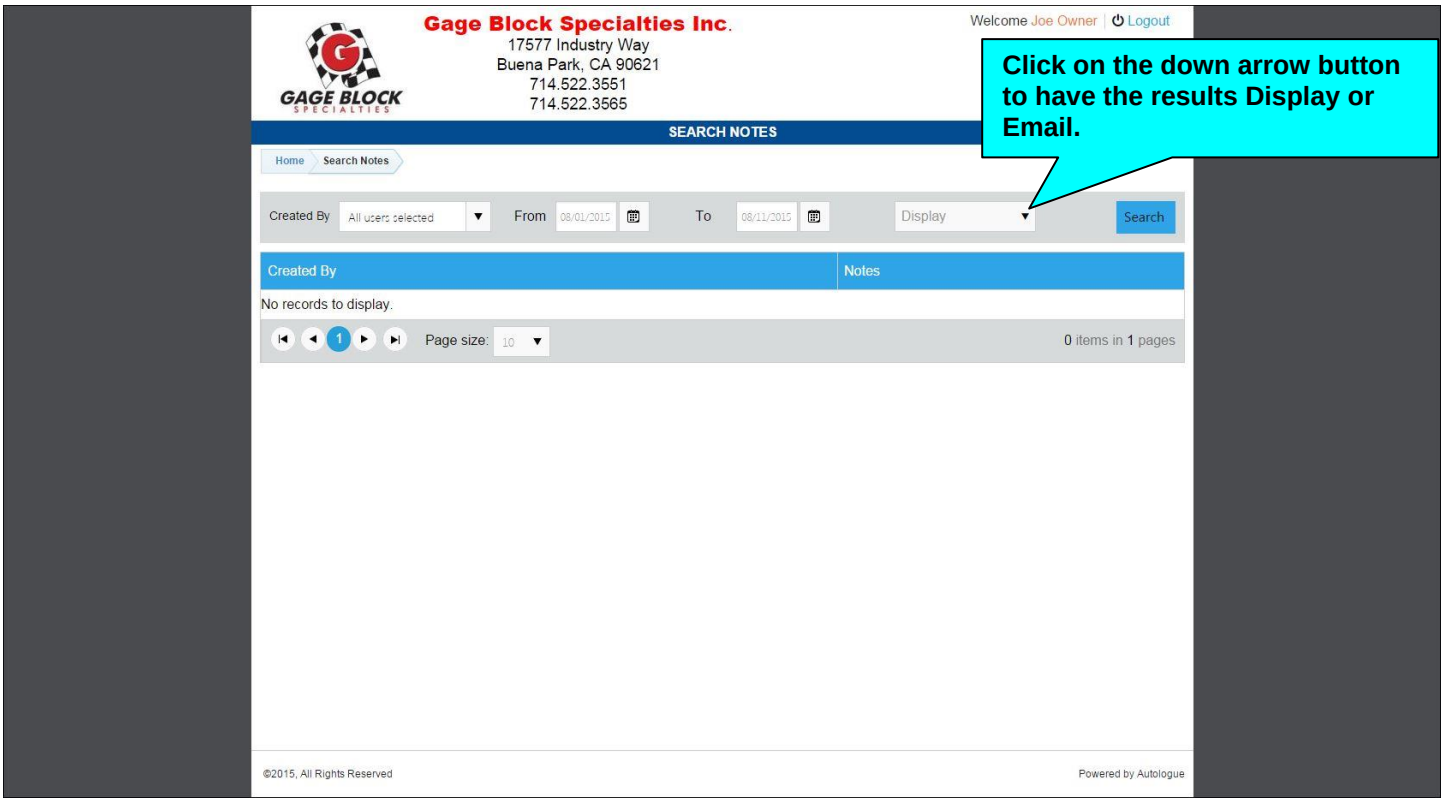
- Click within the `Search by ranking` entry field and enter the ranking code to search by and then click on the `Search` button. The screen will then display only the customers with a matching ranking code.

Search By Name/Number

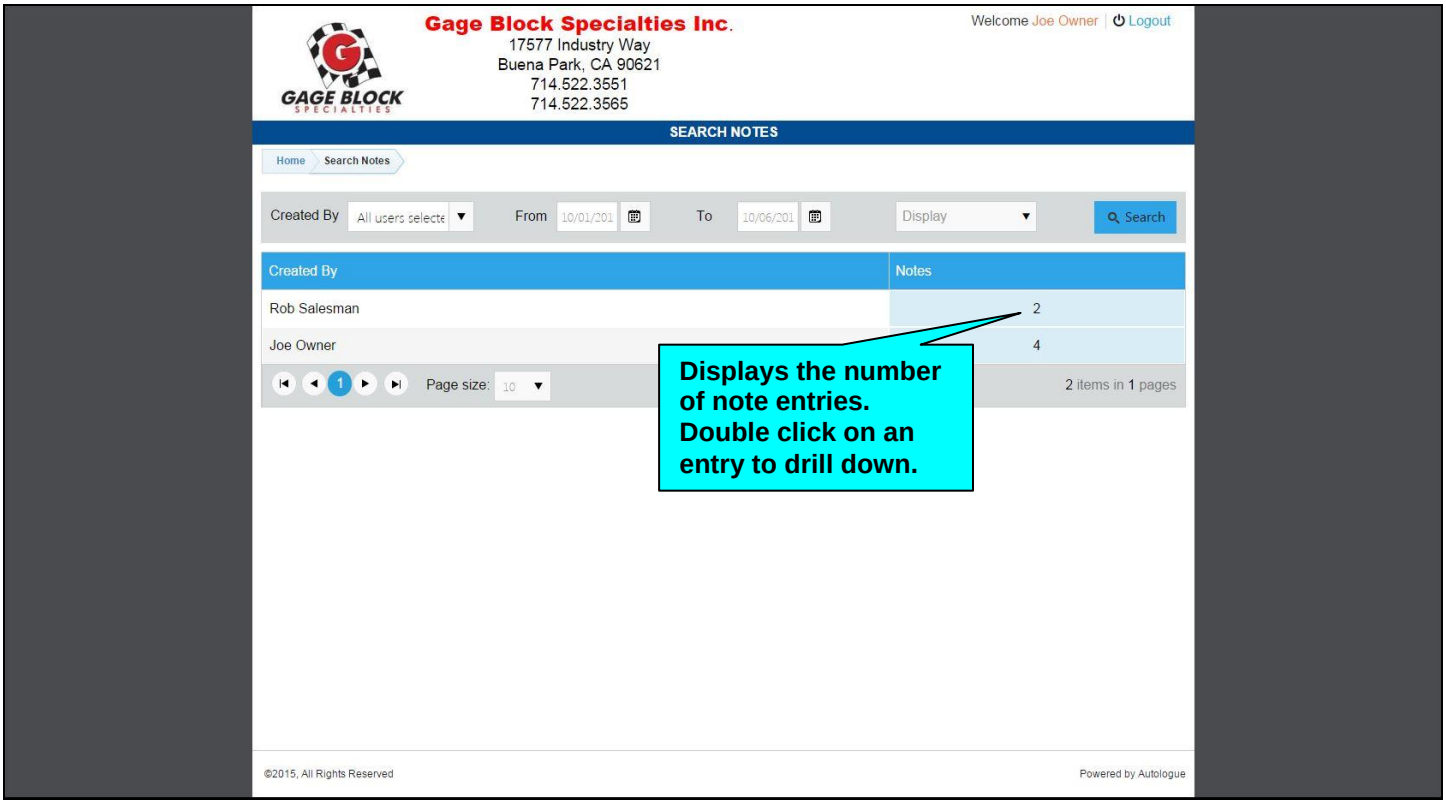
- Click within the `Search by name/number` entry field and enter a customer number or any portion of the customer's name to search by and then click on the `Search` button. The screen will then display only the customers with matching data.

Search Notes

- From the owners home screen, to search for a note entry, click on the `Search Notes` button and the following screen will be displayed:



By default, all `Created By` (users who created notes) are selected and the `From/To` dates will be from the beginning of the current month through the current day. This screen is set to `Display` which means the search results will be displayed to the screen only. The screen only displays results when you click on the `Search` button.

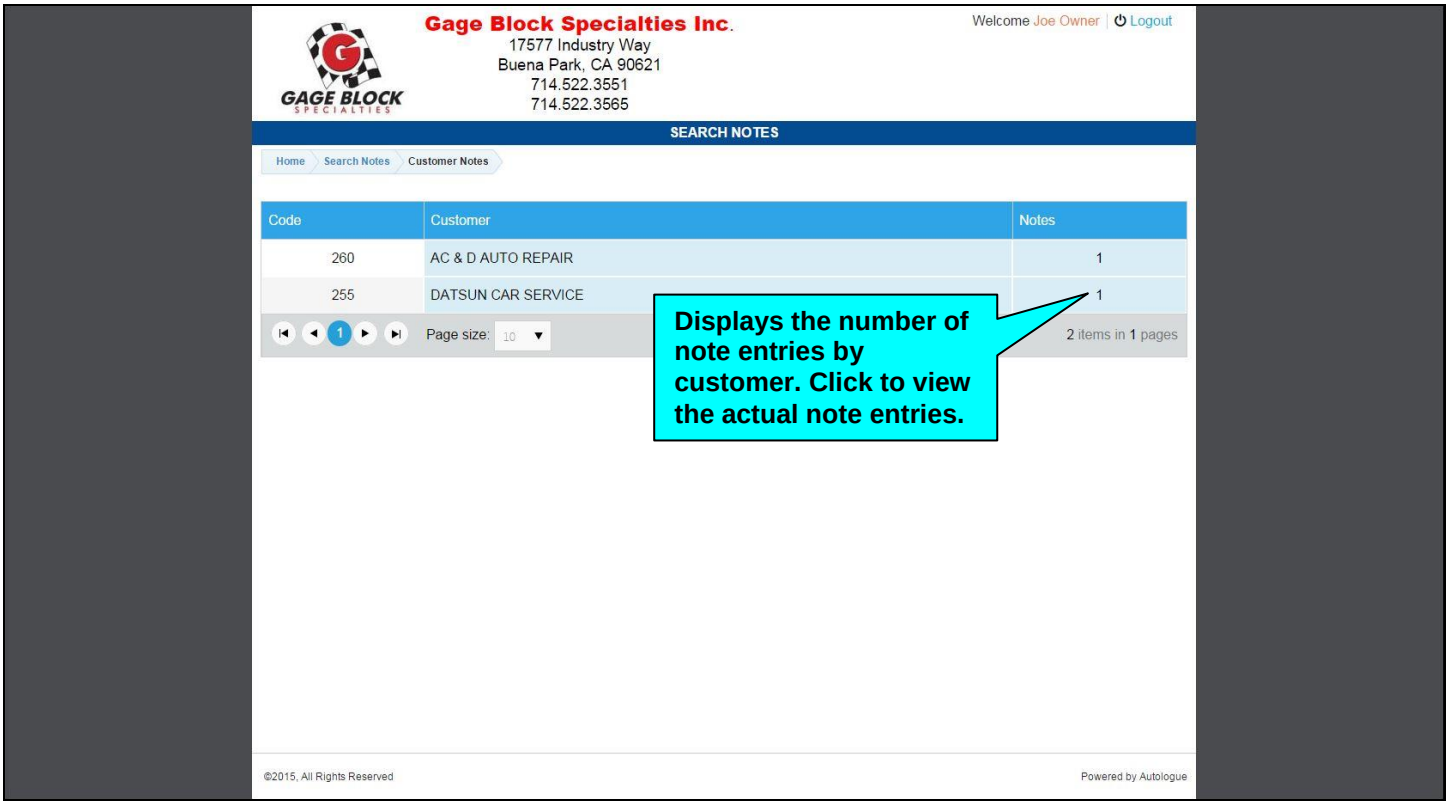


After clicking on the `Search` button, the screen will display a `Created By` column that lists users who have created notes within the selected date range. Besides each user name that is listed, there will be a `Notes` column that will display the number of note entries they have entered.

Drilling Down Into Notes

You have the ability to view or "drill down" into each of the number of note entries listed by User by clicking on the number of notes column to the right of the user name.

The screen will now display a list of customers along with the number of notes that were entered for the customer listed:



To view the note information for the customer, click on the number of notes column to the right of the customer name.

The screen will display the note entry information for the customer as shown:

Gage Block Specialties Inc.
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565
Welcome Joe Owner | Logout
SEARCH NOTES
Home
Search Notes
Customer Notes
Notes
Rob Salesman
260 - AC & D AUTO REPAIR
1 Notes
Met with Bob and offered him an 5% discounts on all lubricants & chemicals.
Created On: 10/1/2014 8:27:38 AM Modified On: 10/1/2014 8:27:38 AM Created By: Rob Salesman Modified By: -
Click on the envelope button to email a note.
Click on the trash can button to delete the note entry.
Click on the edit button to modify a note.
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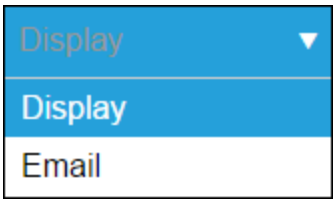
Powered by Autologue

The note entry displays the actual note, the creation/last modification dates, and the user names of who created/modified the note entry. A note can be emailed by clicking on the envelope (✉) icon. The existing note entry can be modified by clicking on the edit (✎) icon. Clicking on the trash can (🗑) icon will delete the note entry.

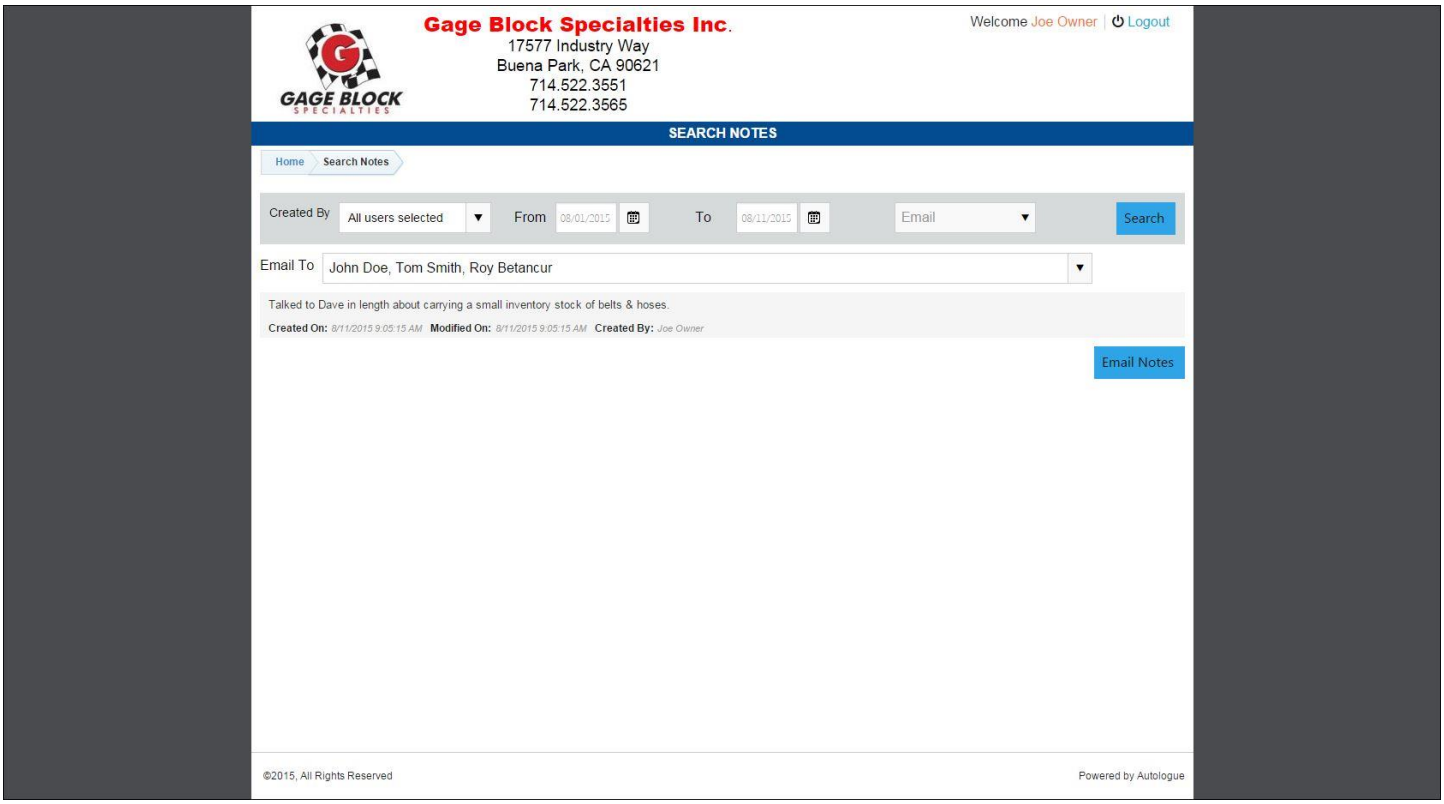
Emailing Search Results

- To have the search results emailed, click on the down arrow button at the end of the `Display` field and the following selection list will be displayed:



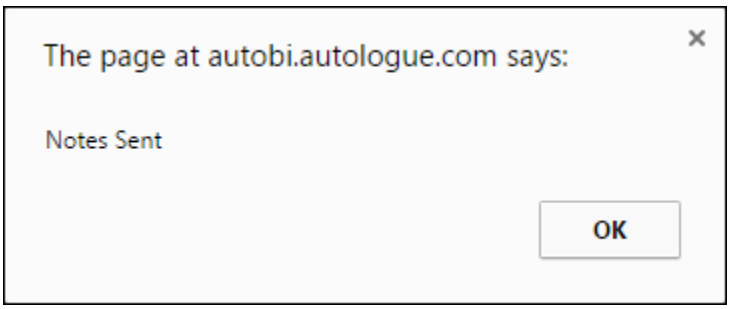
- Click on the `Email` selection and then click on the `Search` button.

The note results will now be displayed on the screen in an email format as shown:



By default, the Email display option actually displays the notes information as the email would look. Within the `Email To` field , all the email recipients that have been setup will be displayed. You have the option to remove any of the email names before clicking on the blue `Email Notes` button to actually send.

When the blue `Email Notes` button is clicked, the following pop up window will be displayed:

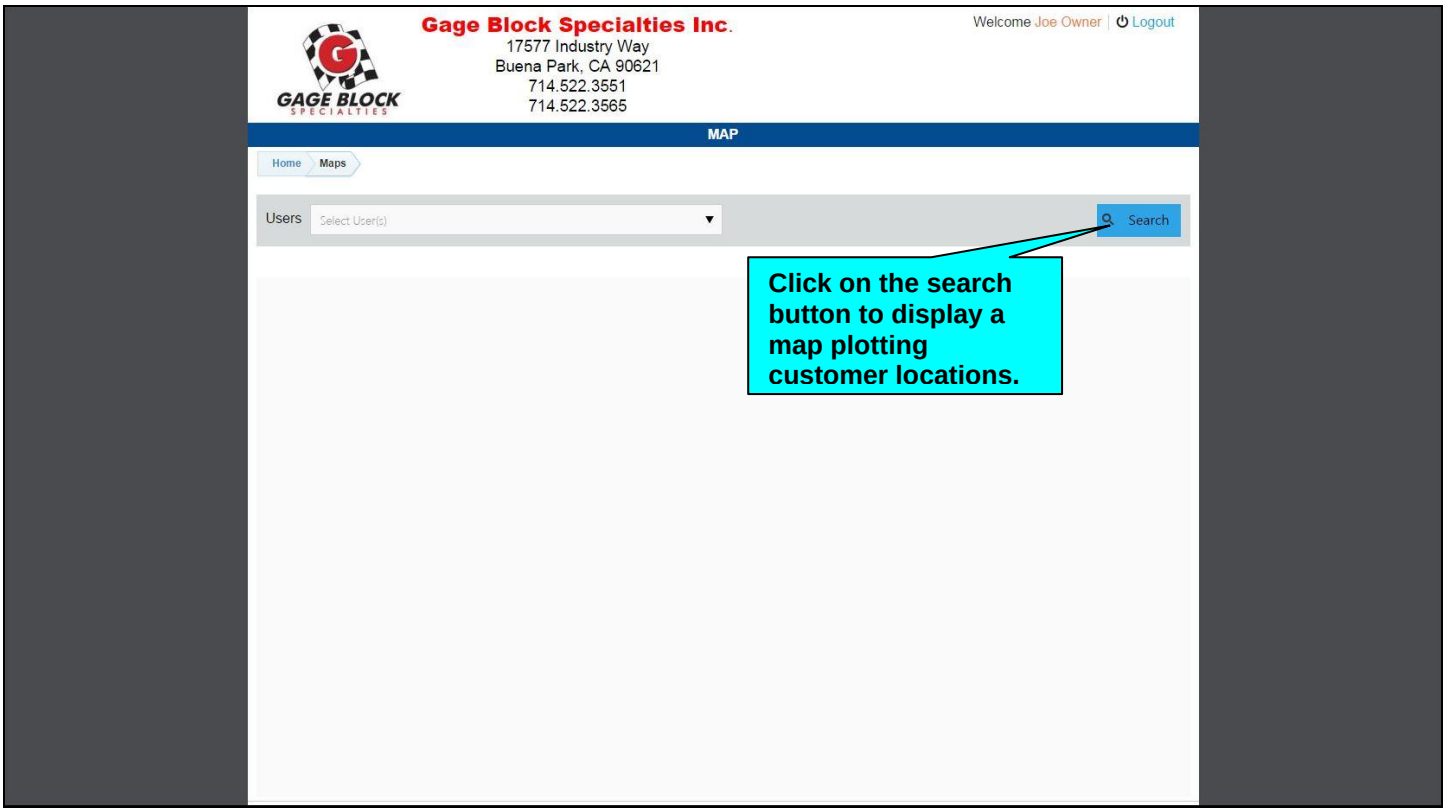


This window informs you that the notes information was emailed.

- Click on the `OK` button to remove the pop up window.

Map

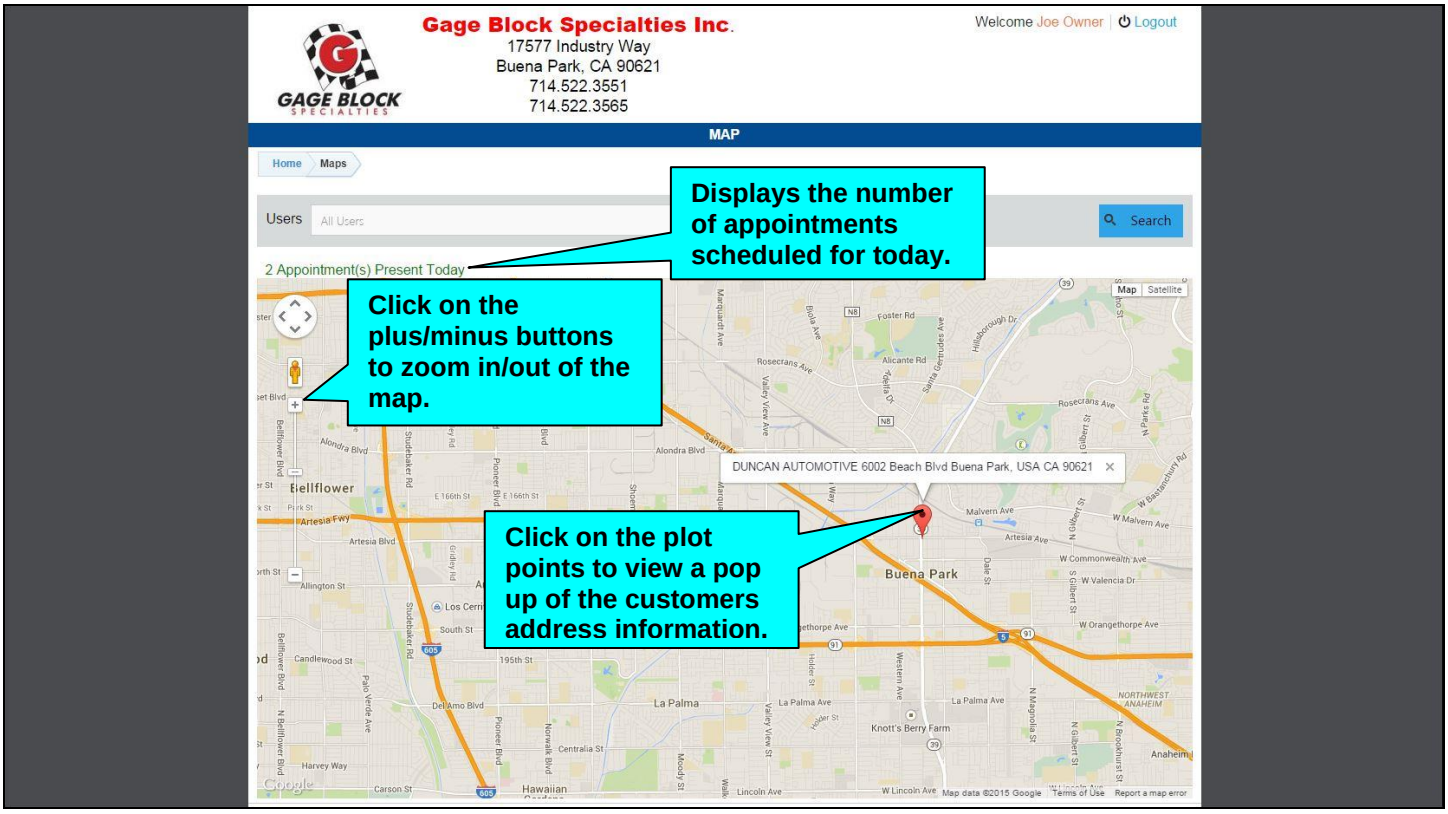
- From the owners home screen, to view a map of the salespersons scheduled appointments for the current day, click on the Map button and the following screen will be displayed:



By default, no map information is displayed.

- To select specific Users to display map information for, click on the down arrow button at the end of the Users field and check mark the specific users you want to see information for.
- To display a map for the days scheduled appointments with the customer locations plotted, click on the Search button.

The screen will now display a map plotting the locations of the customers who are scheduled for appointments as shown:

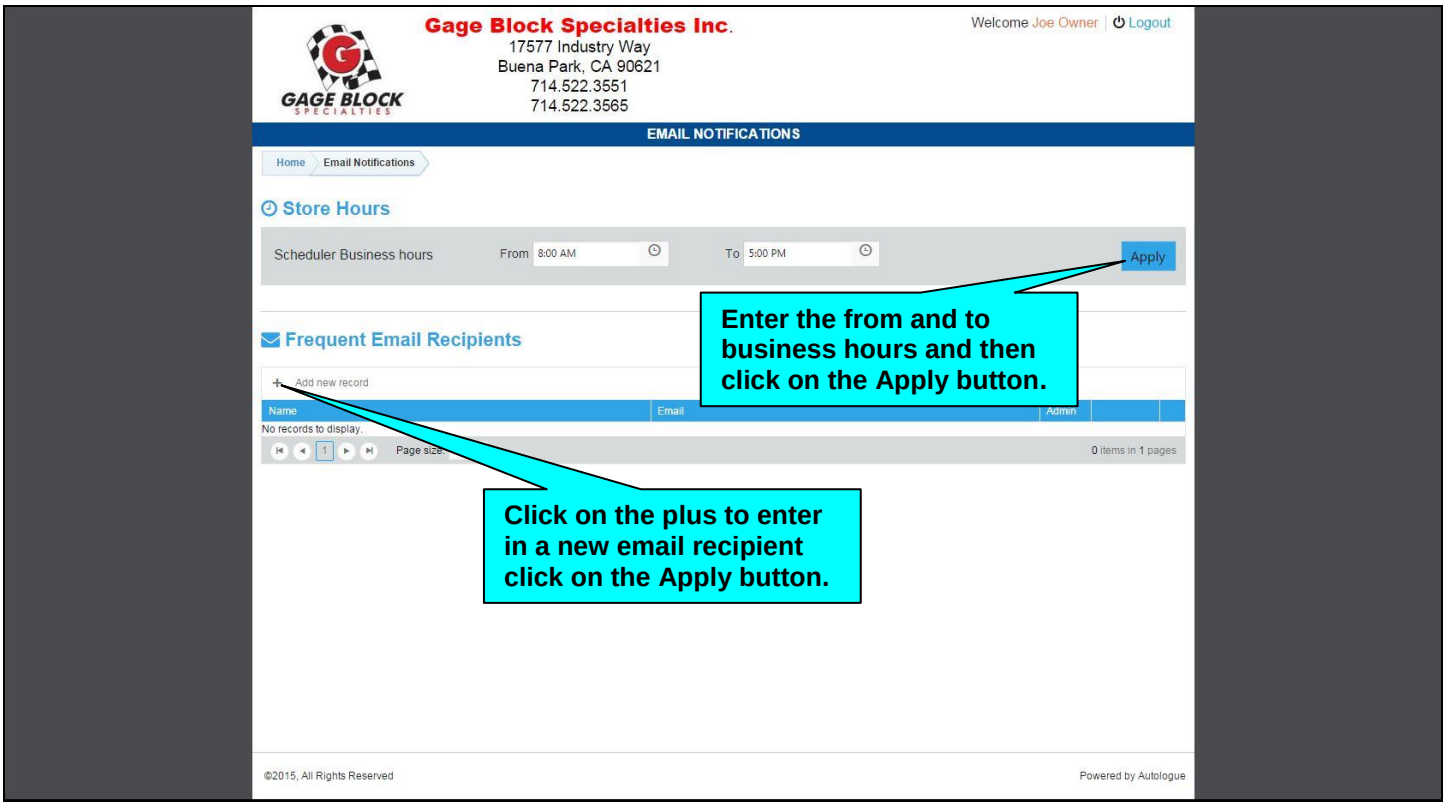


The top of the map will display the number of appointments that are scheduled for the current day.

- Clicking on the plus (+) will zoom in map.
- Click on any of the plot points to see a pop up window that shows the Customer's name and address information.

Email Notifications

- From the owners home screen, to setup the scheduler business hours for your store and/or frequent email recipients, click on the `Email Notifications` button and the following screen will be displayed:

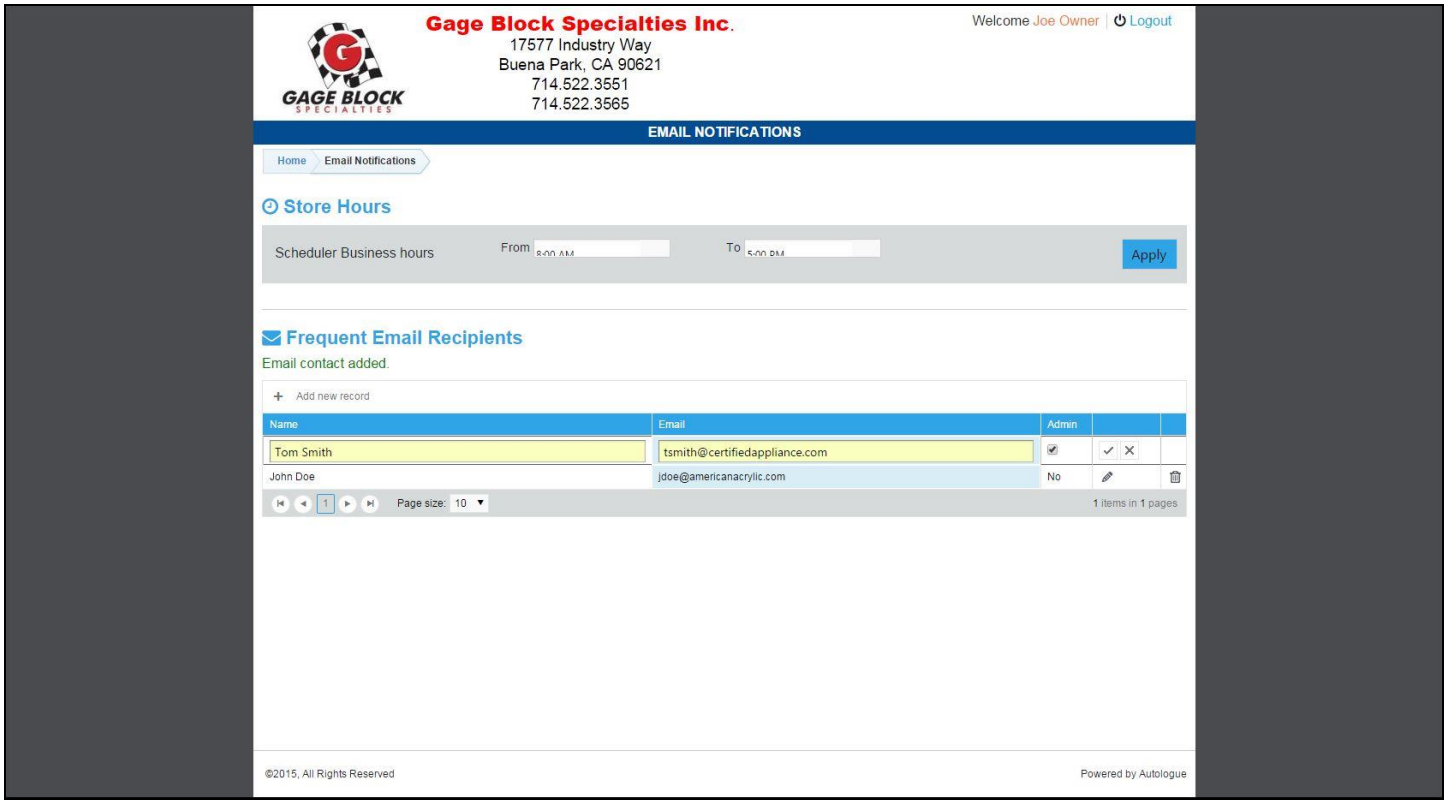


- To setup the scheduler business hours, click within the `From` field and enter the time the business opens. Click within the `To` field and enter the time the business closes. Now click on the `Apply` button to save the entered times.

☞ **Note: This sets the hours the eSales mobile application will send GPS signals to conserve battery life on mobile devices after business hours.**

- To enter in a new email recipient, click on the (**✚**) plus sign to the left of the Add new record.

The screen will now display a blank row:

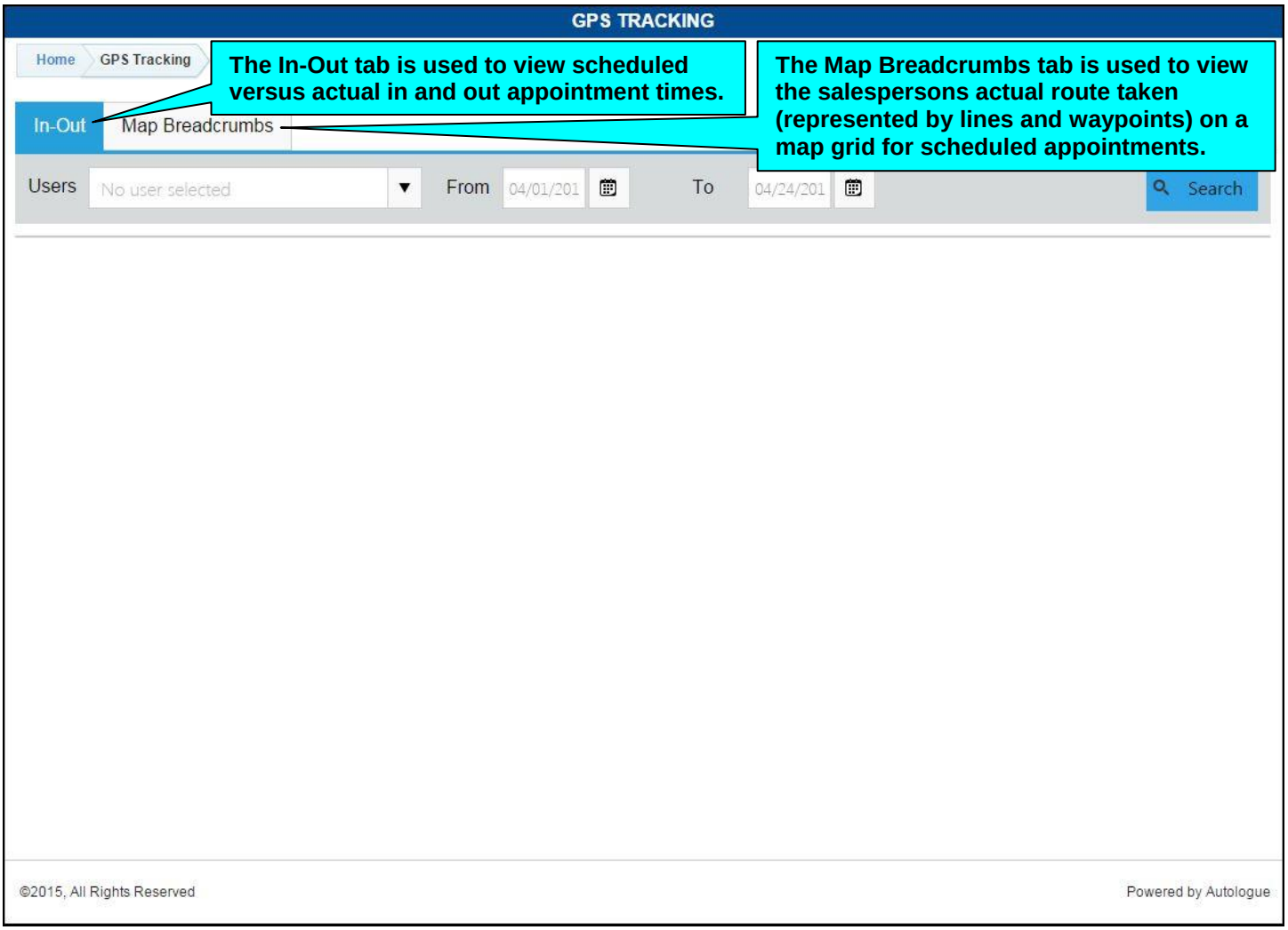


- Click within the `Name` field and enter in the recipients' full name. Click within the `Email` field and enter in the recipients' email address. If the person is in administration, click on the `Admin` check box field. Click on the (✓) check mark sign to save the record.

☞ **<u>Note:</u> All names that have the admin field check marked will automatically receive a daily email of all notes entered within the past 24 hours!**

GPS Tracking

- From the owners home screen, to view GPS tracking information for your salesmen's appointments, click on the `GPS Tracking` button and the following screen will be displayed:


GPS TRACKING
Home
GPS Tracking
The In-Out tab is used to view scheduled versus actual in and out appointment times.
The Map Breadcrumbs tab is used to view the salespersons actual route taken (represented by lines and waypoints) on a map grid for scheduled appointments.
In-Out
Map Breadcrumbs
Users
No user selected
From
04/01/201
To
04/24/201
Search
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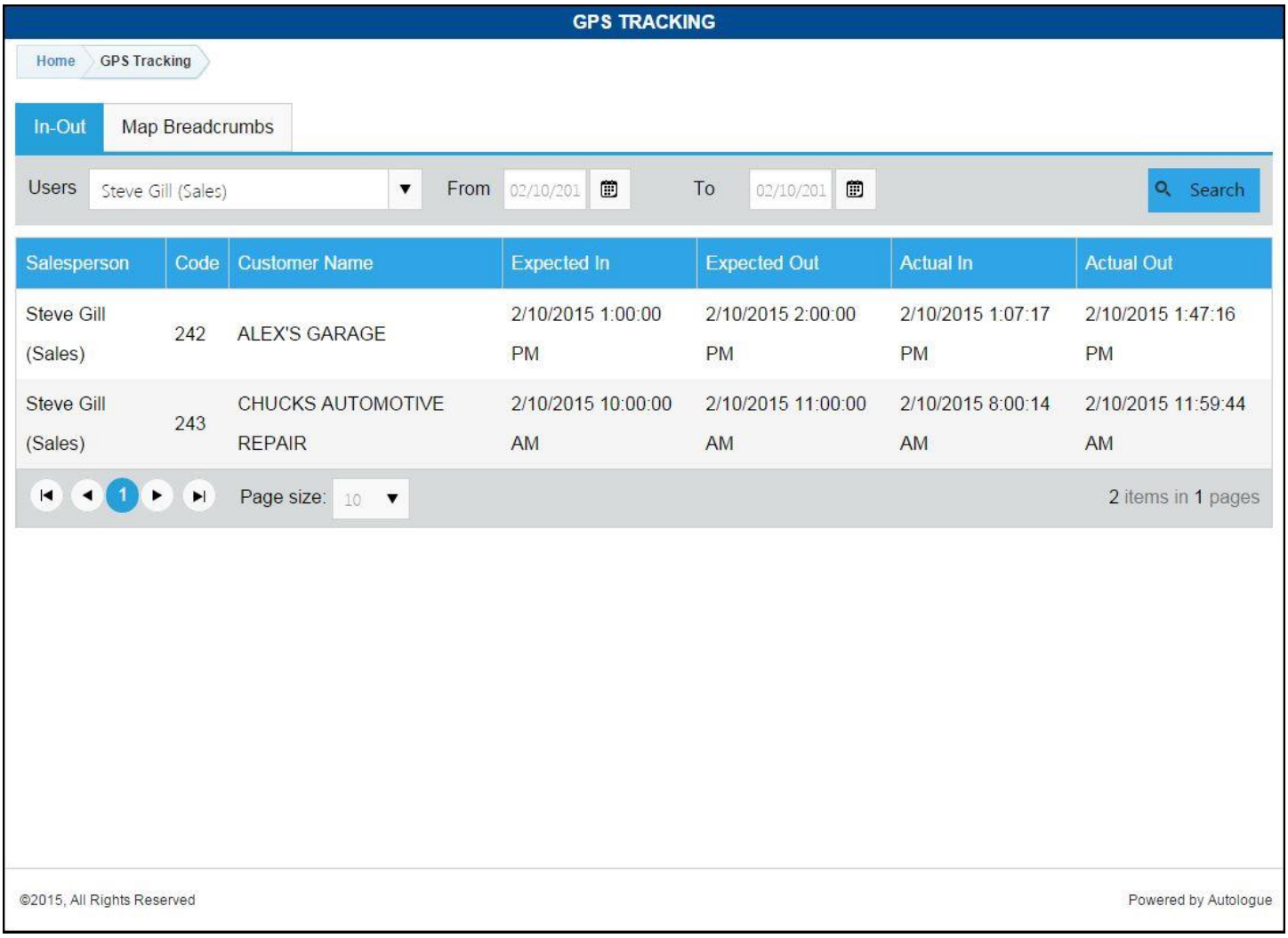
Powered by Autologue

By default, the *In-Out* tab screen is shown with no Users selected so the screen will therefore be blank. Owners have the option to view Users in and out times for scheduled appointments based upon a GPS mobile tracking device. They also have the option (via the *Map Breadcrumbs* tab) to view a map that shows the users "breadcrumbs" (lines that shows the actual route taken on a map grid via the GPS mobile device). The GPS mobile device will upload the vehicles coordinates every 2 minutes so this information can be captured and viewed.

In-Out Time Tracking

The *In-Out* tab screen is used to view and compare users scheduled versus actual in and out times for their appointments. Owners have the option to view users in and out times for scheduled appointments based upon a GPS mobile tracking device. They also have the option (via the *Map Breadcrumbs* tab) to view a map that shows the users "breadcrumbs" (lines that shows the actual route taken on a map grid via the GPS mobile device). The GPS mobile device will upload the vehicles coordinates every 2 minutes so this information can be captured and viewed.

- You have the ability to select one or more users to view in-out information for by clicking on the down arrow button at the end of the `Users` field and check mark only the specific users you want to report on from the drop down selection list.
- To change the date range to show activity for, click within the `From/To` fields and enter in the specific dates. Optionally you can click on the calendar buttons to the right of the `From/To` fields and then click on the specific dates to select the date.
- Now click on the `Search` button and the screen will then redraw the screen with the in-out schedule information for the selecting salespersons.

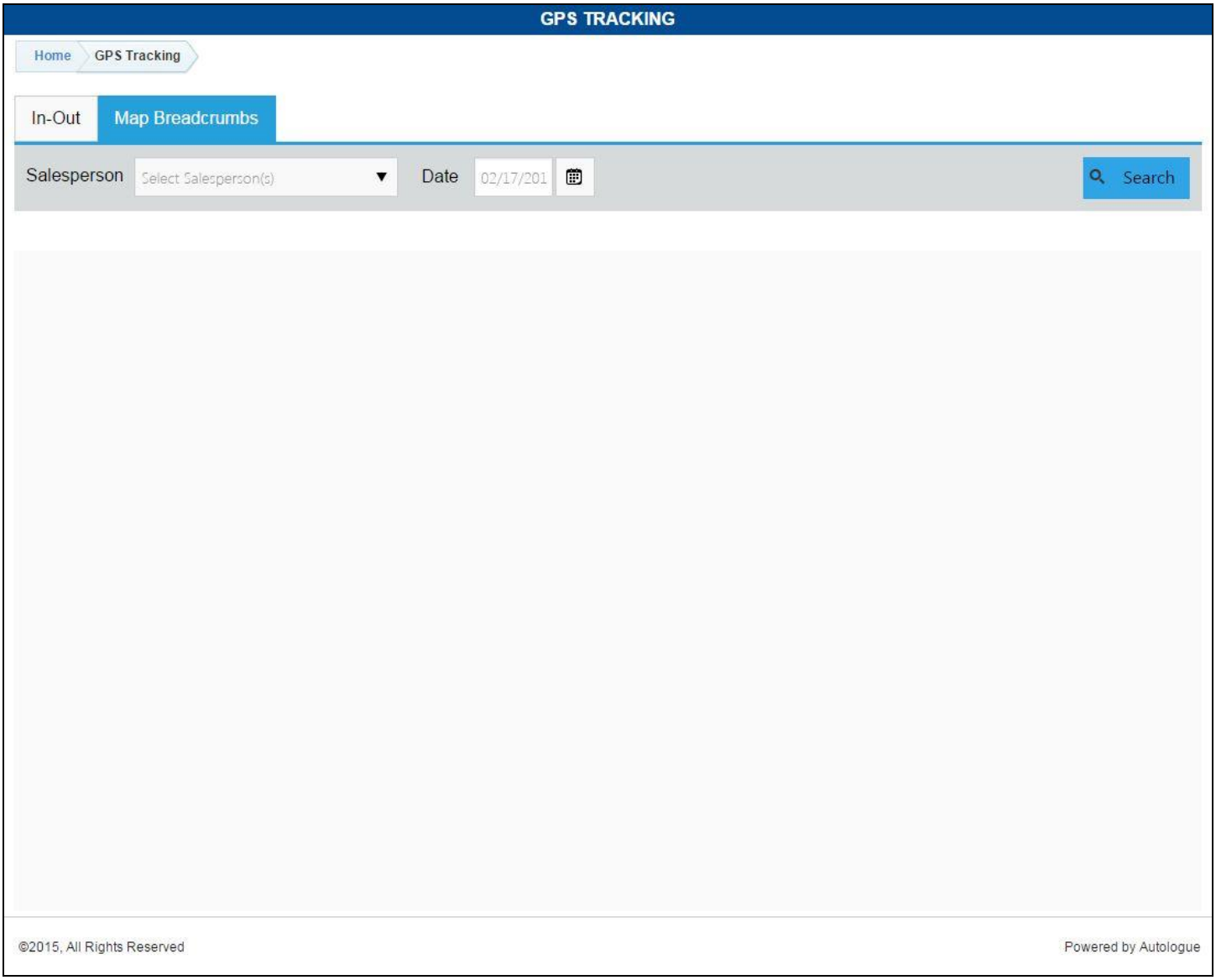


The screen will show the *User*, the *Customer Name* with whom the appointment was scheduled for, the *Expected In* time the appointment was scheduled to start, the *Expected Out* time the appointment was scheduled to end, the *Actual In* time the user arrived at the customer's location, the *Actual Out* time the user left from the customer's location.

Map Breadcrumbs

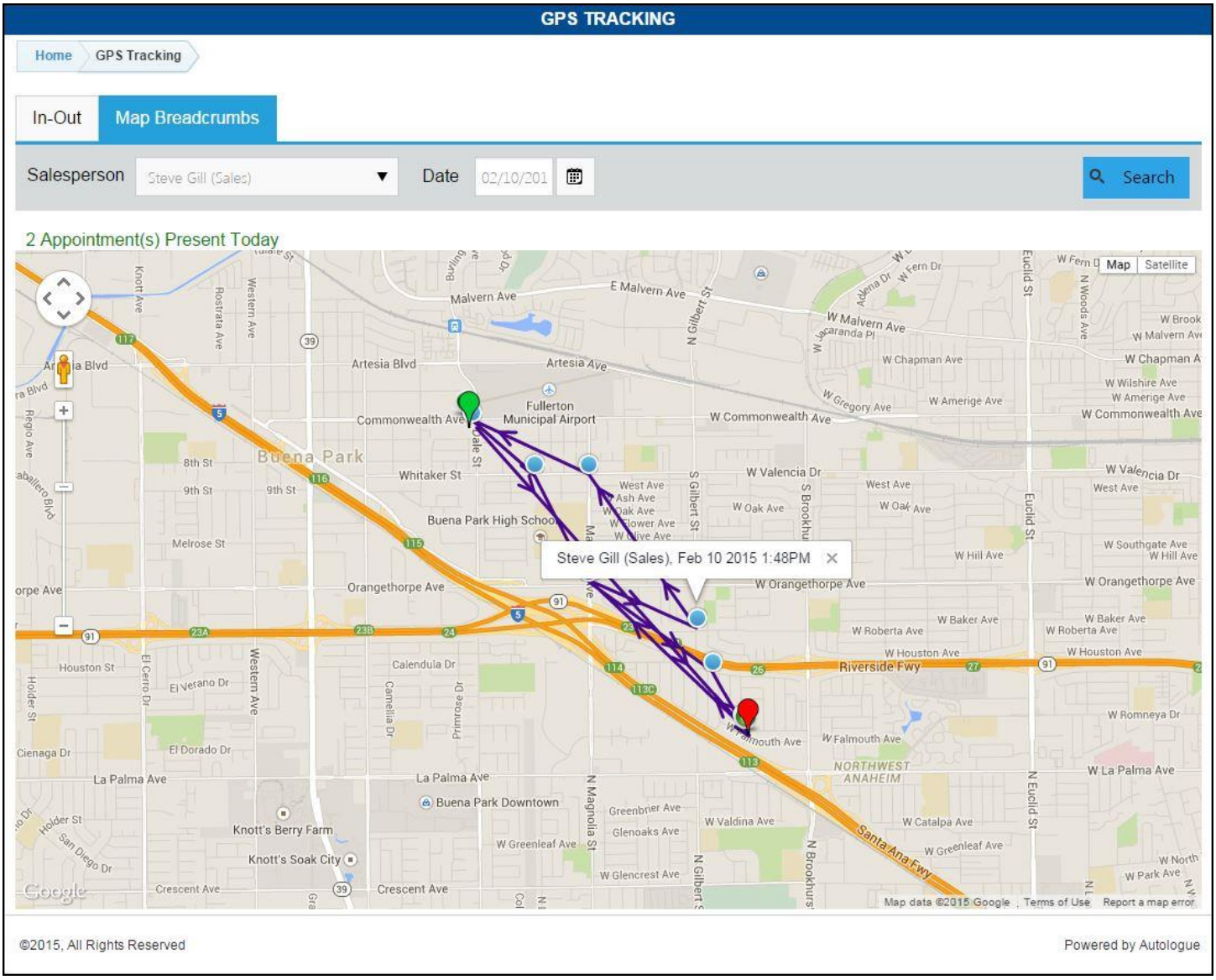
The *Map Breadcrumbs* tab screen is used to view a map that shows the salespersons "breadcrumbs" (lines that show the actual route taken on a map grid via the GPS mobile device) for a particular days scheduled appointments.

- To begin viewing this information click on the *Map Breadcrumbs* tab screen.



By default, the *Map Breadcrumbs* tab screen is shown with no salespersons selected so the screen will therefore be blank.

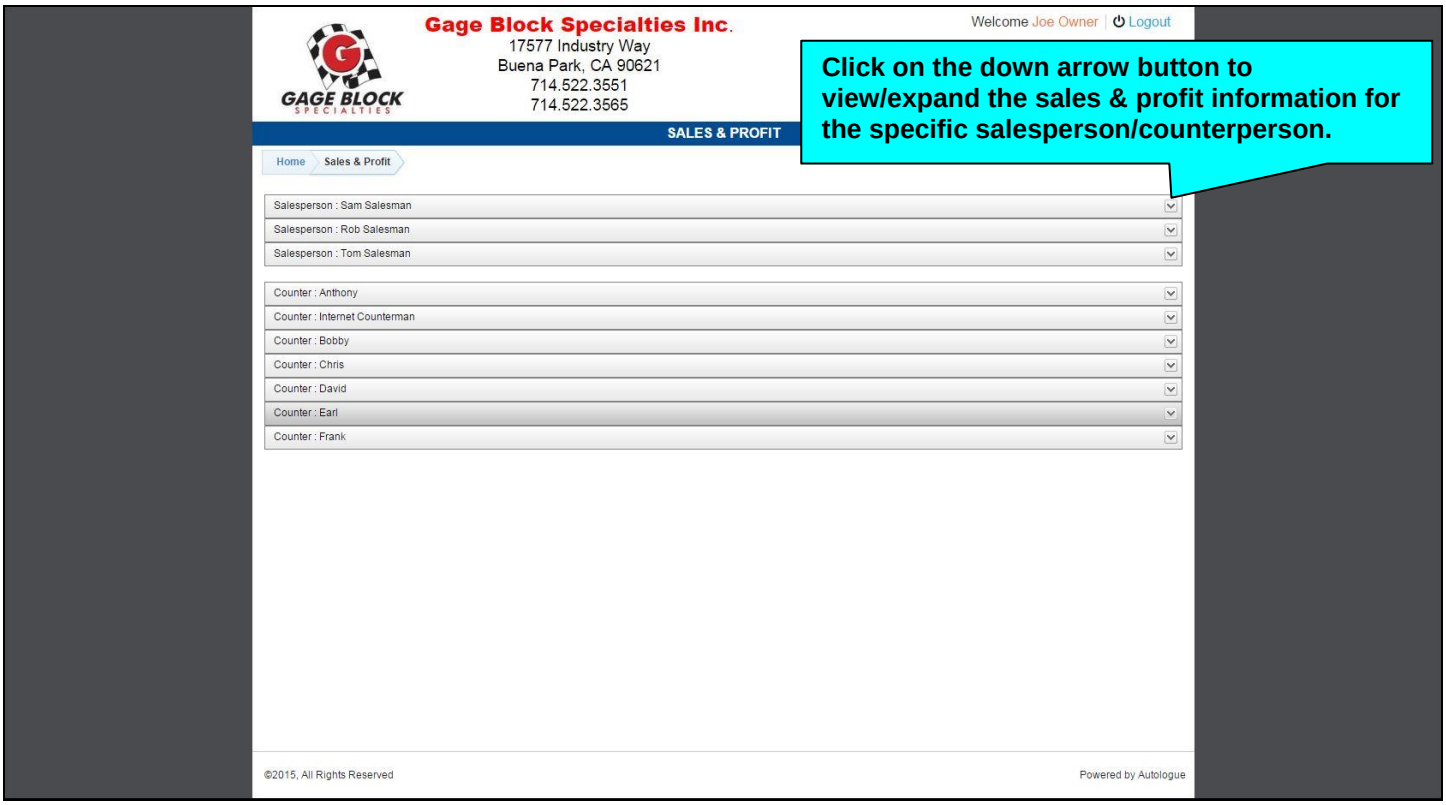
- You have the ability to select one or more salespersons to view in-out information for by clicking on the down arrow button at the end of the `Salesperson` field and check mark only the specific salesperson's you want to report on from the drop down selection list.
- To change the date to show activity for, click within the `Date` field and enter in a specific date. Optionally you can click on the calendar button to the right of the `Date` field and then click on the specific date to select.
- Now click on the `Search` button and the screen will then redraw the screen showing a map with GPS waypoints (start – green, stop – red, waypoint - blue) plotted for scheduled appointments for the selecting salespersons.



Click on any of the plotted GPS waypoints (start – green, stop – red, waypoint - blue) to see the Salesman name and the date/time when they were at that particular location on the map.

Sales & Profit

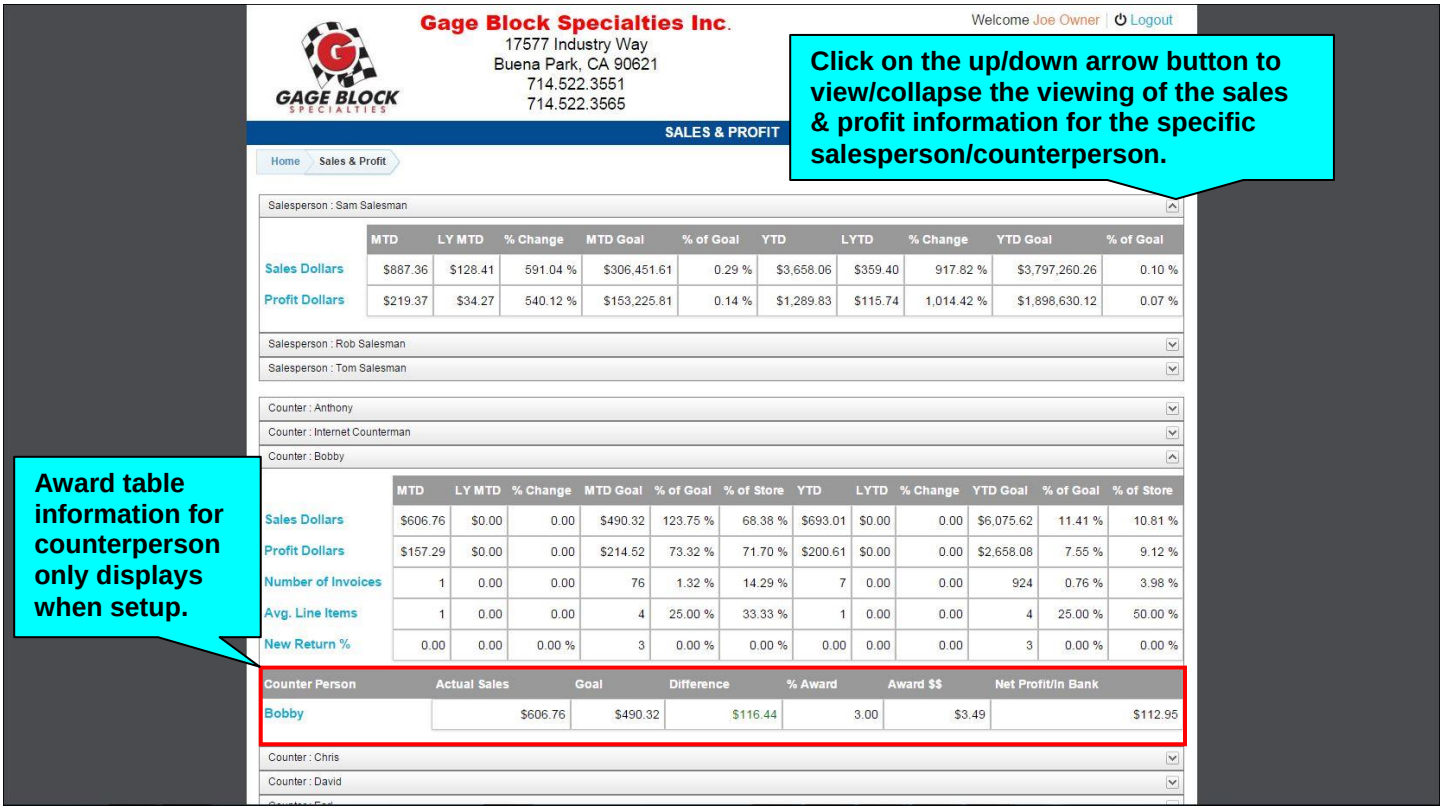
- From the owners home screen, to view the sales and profit information for salespersons & counterpersons, click on the `Sales & Profit` button and the following screen will be displayed:



The screen will display a collapsed listing of all salespersons and counterpersons.

Explanding/Viewing The Sales & Profit Information

- You have the ability to display/expand the sales and profit information for any of the listed salespersons and counterpersons by clicking on the down arrow button at the end of the specific salesperson/counterperson as shown:


Gage Block Specialties Inc.
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565
Welcome Joe Owner | Logout
SALES & PROFIT
Home
Sales & Profit
Click on the up/down arrow button to view/collapse the viewing of the sales & profit information for the specific salesperson/counterperson.
Salesperson : Sam Salesman
Salesperson : Rob Salesman
Salesperson : Tom Salesman
Counter : Anthony
Counter : Internet Counterman
Counter : Bobby
Counter : Chris
Counter : David
Award table information for counterperson only displays when setup.

	MTD	LY MTD	% Change	MTD Goal	% of Goal	YTD	LYTD	% Change	YTD Goal	% of Goal
Sales Dollars	$887.36	$128.41	591.04 %	$306,451.61	0.29 %	$3,658.06	$359.40	917.82 %	$3,797,260.26	0.10 %
Profit Dollars	$219.37	$34.27	540.12 %	$153,225.81	0.14 %	$1,289.83	$115.74	1,014.42 %	$1,898,630.12	0.07 %

	MTD	LY MTD	% Change	MTD Goal	% of Goal	% of Store	YTD	LYTD	% Change	YTD Goal	% of Goal	% of Store
Sales Dollars	$606.76	$0.00	0.00	$490.32	123.75 %	68.38 %	$693.01	$0.00	0.00	$6,075.62	11.41 %	10.81 %
Profit Dollars	$157.29	$0.00	0.00	$214.52	73.32 %	71.70 %	$200.61	$0.00	0.00	$2,658.08	7.55 %	9.12 %
Number of Invoices	1	0.00	0.00	76	1.32 %	14.29 %	7	0.00	0.00	924	0.76 %	3.98 %
Avg. Line Items	1	0.00	0.00	4	25.00 %	33.33 %	1	0.00	0.00	4	25.00 %	50.00 %
New Return %	0.00	0.00	0.00 %	3	0.00 %	0.00 %	0.00	0.00	0.00	3	0.00 %	0.00 %

Counter Person	Actual Sales	Goal	Difference	% Award	Award $$	Net Profit/In Bank
Bobby	$606.76	$490.32	$116.44	3.00	$3.49	$112.95

The screen will now display the expanded view of sales & profit information for the specific salesperson and/or counterperson whose arrow buttons were clicked on. When an award percentage has been setup for a counterperson, an award table that contains the actual sales amount, goal amount, the difference (goal – actual), award percentage and the award dollar amount earned when the sales goal has been met. Note: The award table only displays when setup.

Collapsing The Sales & Profit Information

The viewing of sales & profit information can be removed/collapsed from being viewed by clicking on the up arrow buttons.

Alerts & Notifications

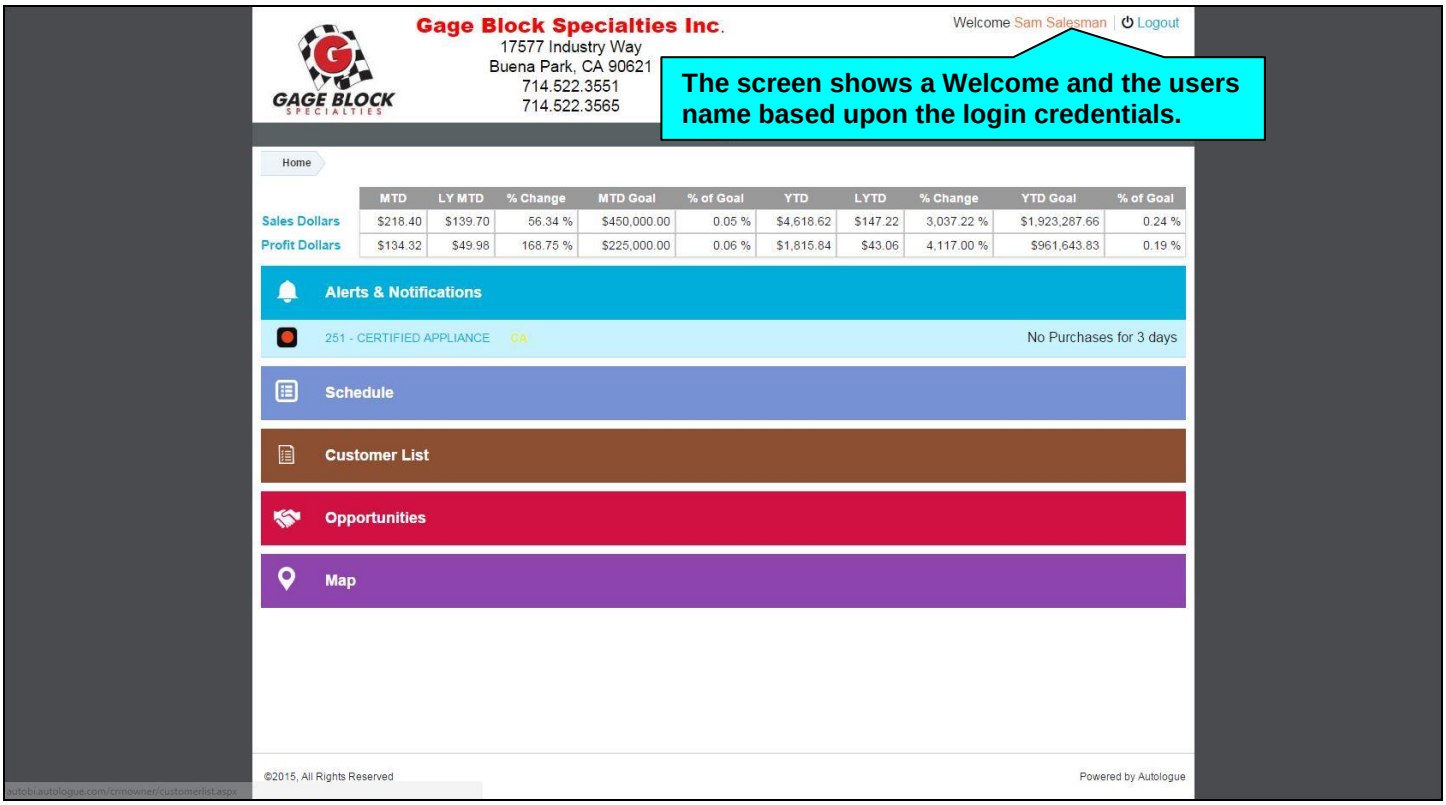
- From the owners home screen, if any alerts or notification has been setup and/or met, they will be displayed below the `Alerts & Notifications` heading section as shown:

User Activity
User Schedule
Search CRM by Field
Customers
Search Notes
Map
Sales & Profit
The screen shows all alerts & notifications below the respective heading section.
Alerts & Notifications
This is a test notification from the setup screen
20117 - A AND M AUTO AND TRUCK REPAIR
No Purchases for 5 days
59005 - MEINEKE KandC FROST INC
No Purchases for 5 days
20032 - DICK HANNAH KIA
Down 55.4% of Average Daily Purchases
30061 - AUTOTUDE INC.
Down 152.3% of Average Daily Purchases
30099 - LONGVIEW ALIGNMENT SERVICE
Down 100.0% of Average Daily Purchases
60073 - UNBEATABLE AUTOMOTIVE LLC.-1
Down 75.9% of Average Daily Purchases
20109 - ALICIA'S AUTO REPAIR
Over Returned $89.7
20050 - ART KUZMA MOTORS
Over Returned $33.08

The screen above shows an example of an alert for customers who haven't made a purchase in the past 5 days, whose purchases are trending down, and who are over returning merchandise. Notifications are always listed first and alerts second.

Salesman Login Screen

When a salesman has logged in using their salesman password, the following screen will be displayed:


Gage Block Specialties Inc.
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565
Welcome Sam Salesman | Logout
The screen shows a Welcome and the users name based upon the login credentials.
Home
MTD LY MTD % Change MTD Goal % of Goal YTD LYTD % Change YTD Goal % of Goal
Sales Dollars $218.40 $139.70 56.34 % $450,000.00 0.05 % $4,618.62 $147.22 3,037.22 % $1,923,287.66 0.24 %
Profit Dollars $134.32 $49.98 168.75 % $225,000.00 0.06 % $1,815.84 $43.06 4,117.00 % $961,643.83 0.19 %
Alerts & Notifications
251 - CERTIFIED APPLIANCE CA
No Purchases for 3 days
Schedule
Customer List
Opportunities
Map
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This is the salesperson's home screen. It shows the sales & profit dollar figures for the current month versus last year's current month, the percentage of change between the two, month to date sales goal dollars and the percentage of the goal, year to date versus last year to date, the percentage of change between the two, year to date sales goal dollars and the percentage of the goal based upon their customers. Here the salesperson has the ability to perform the following:

• View alerts & notifications	• View their upcoming scheduled calls/visits on the calendar
• Display a listing of their customers	• View opportunities
• View a map of scheduled customer locations for the day	

Alerts & Notifications

From the salesman's home screen, if any alerts or notification has been setup and/or met, they will be displayed below the `Alerts & Notifications` heading section as shown:

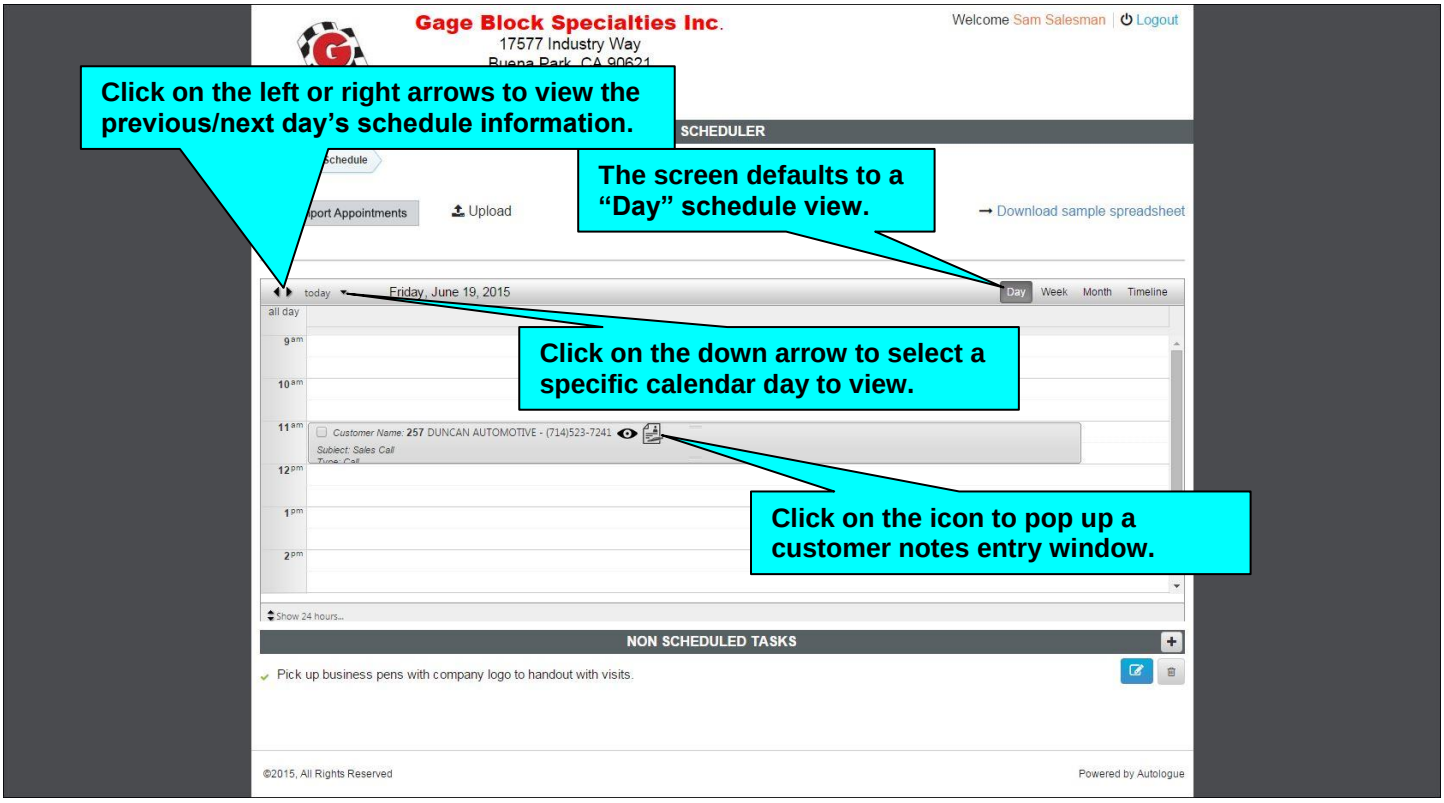
The screen above shows an example of an alert for customers who haven't made a purchase in the past 5 days, whose purchases are trending down, and who are over returning merchandise. Notifications are always listed first and alerts second.

Schedule

- From the salespersons home screen, to view the scheduler, click on the `Schedule` menu bar.

Day Schedule View

By default, the screen will display a daily schedule view as shown:


Gage Block Specialties Inc.
17577 Industry Way
Welcome Sam Salesman | Logout
Click on the left or right arrows to view the previous/next day's schedule information.
SCHEDULER
The screen defaults to a "Day" schedule view.
Upload
Download sample spreadsheet
today
Friday, June 19, 2015
Day
Week
Month
Timeline
all day
Click on the down arrow to select a specific calendar day to view.
Customer Name: 257 DUNCAN AUTOMOTIVE - (714)523-7241
Subject: Sales Call
Click on the icon to pop up a customer notes entry window.
Show 24 hours...
NON SCHEDULED TASKS
Pick up business pens with company logo to handout with visits.
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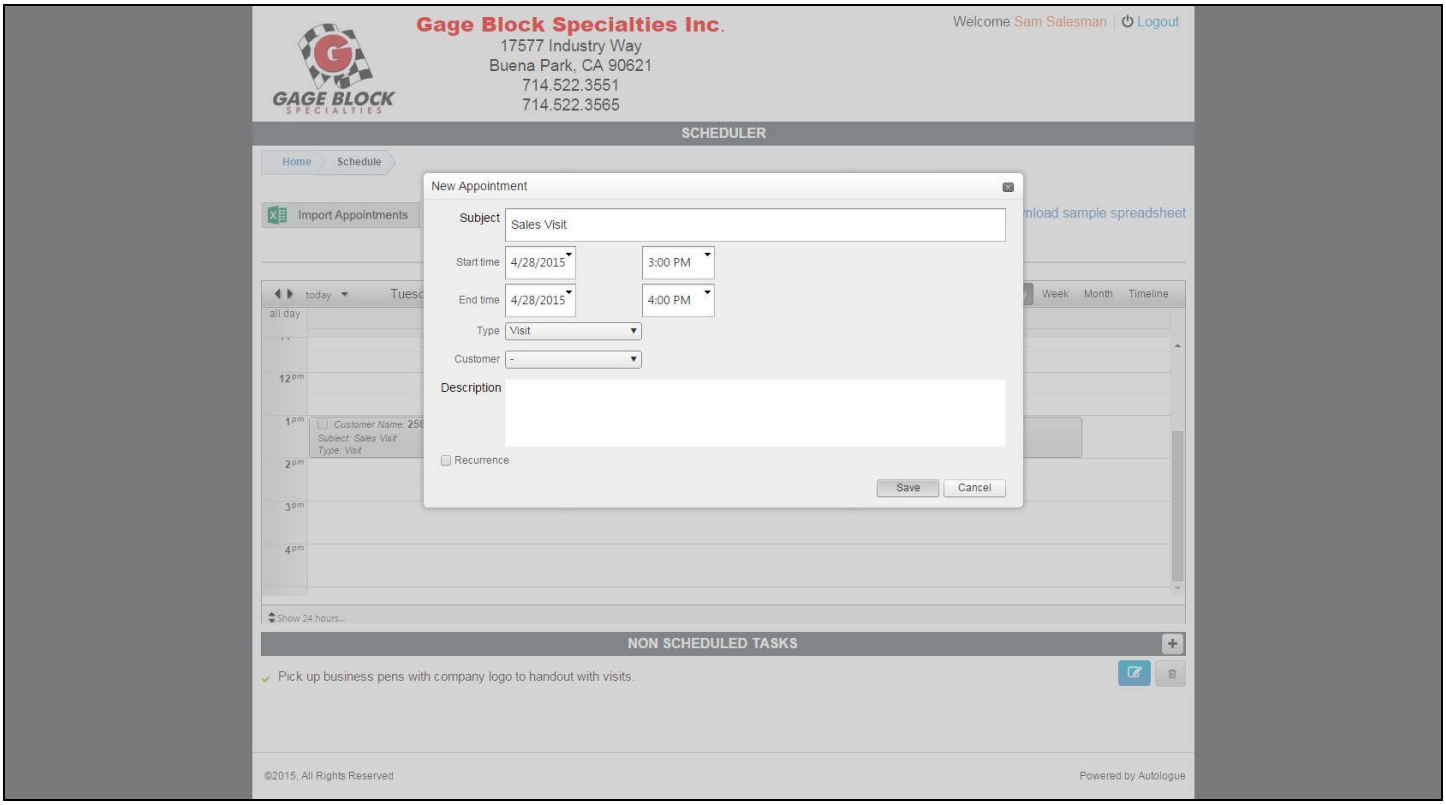
Powered by Autologue

The day schedule view shows all appointments only for the specific day below the `SCHEDULER` heading. Any entered tasks are listed below the `NON SCHEDULED TASKS` section heading.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next day's schedule information. Click on the down arrow button to select a specific calendar day to view.

Scheduling A New Appointment

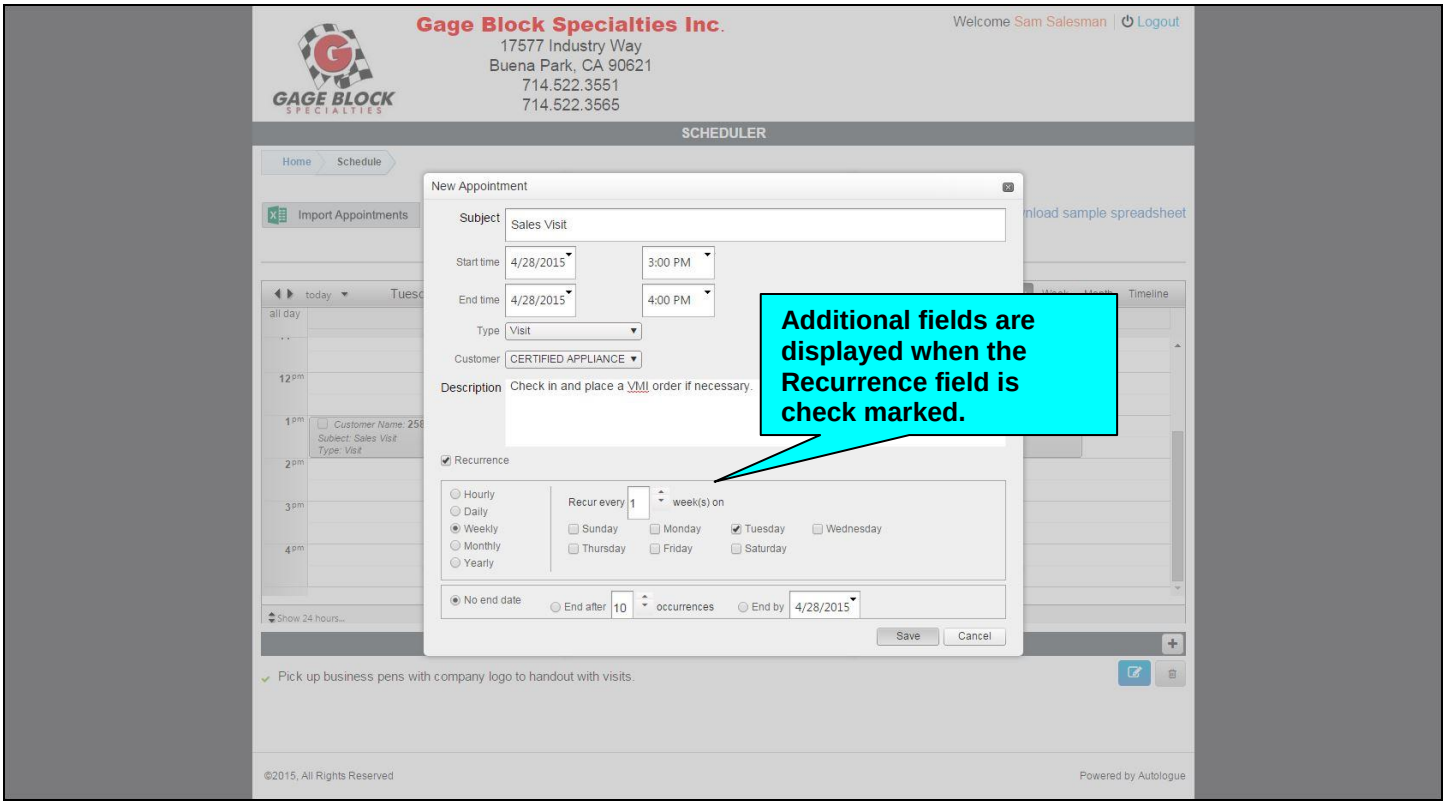
- To schedule a new appointment, double click on a specific time slot shown on the schedule and the following screen will be displayed:



The screen will now display a `New Appointment` pop up window with the `Subject` field defaulted to *Sales Visit* and the appointment `Type` field defaulted to *Visit*.

- With the cursor positioned within the `Subject` field, you have the option to change the default value of *Sales Visit* and press the `<Tab>` key.
- With the cursor positioned within the `Start time` field, you have the option to change the default date and time and value press the `<Tab>` key.
- With the cursor positioned within the `End time` field, you have the option to change the default date and time and value press the `<Tab>` key.
- With the cursor positioned within the `Type` field, you have the option to change the default value of *Visit* by clicking on the down arrow at the end of the field to view a drop down selection list of either *Visit* to *Call*. Click on the desired type and press the `<Tab>` key.
- With the cursor positioned within the `Customer` field, click on the down arrow at the end of the field to view a drop down selection list of all the salespersons customers. Click on the customer you want to set up an appointment for and press the `<Tab>` key.
- With the cursor positioned within the `Description` field, you have the option to enter in a description and press the `<Tab>` key.
- If the appointment is going to be a recurring occurrence, click on the `Recurrence` check box field.

The bottom of the `New Appointment` pop up window will now display some additional field in regards to the recurrence as shown:



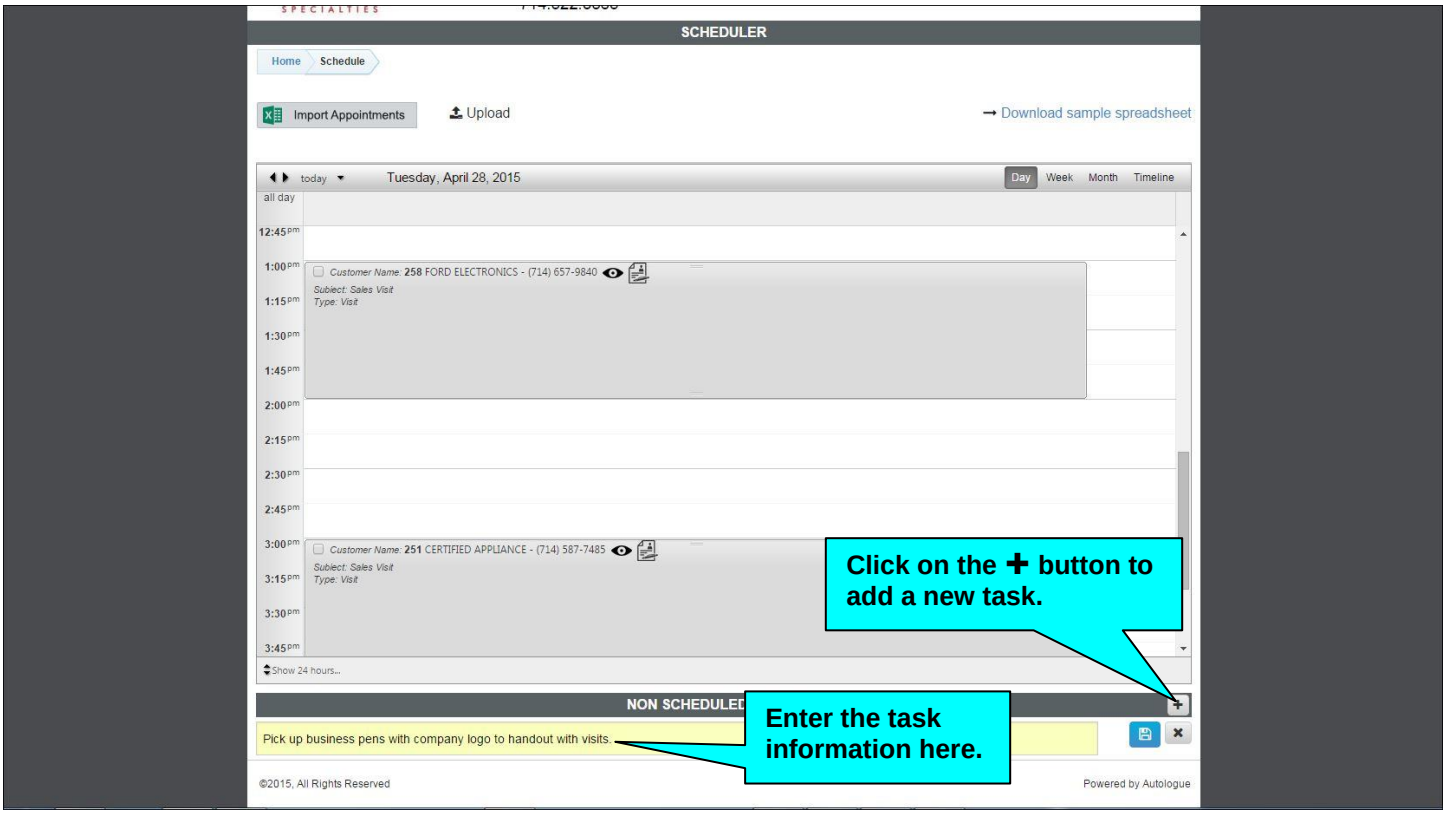
By default the `Weekly` and the current day will be set. You have the option to change any of these values to match the frequency of your recurring appointment.

- Once all your fields have been setup, click on the `Save` button.

The appointment will now be displayed within the time slot setup within the `SCHEDULER`.

Adding A Task

- To add a new task under the NON SCHEDULED TASK heading section, click on the new (✚) button and the following screen will be displayed:



The screen will now display a new blank entry task field below NON SCHEDULED TASK heading.

- With the cursor positioned within the blank task field, enter the task information and then click on the blue add (🖬) icon to save the entered information.

Editing A Task

- To edit an existing task under the NON SCHEDULED TASK heading section, click on the blue edit (✎) icon and enter the new task information and then click on the blue update (🗘) icon to save the changes.

Deleting A Task

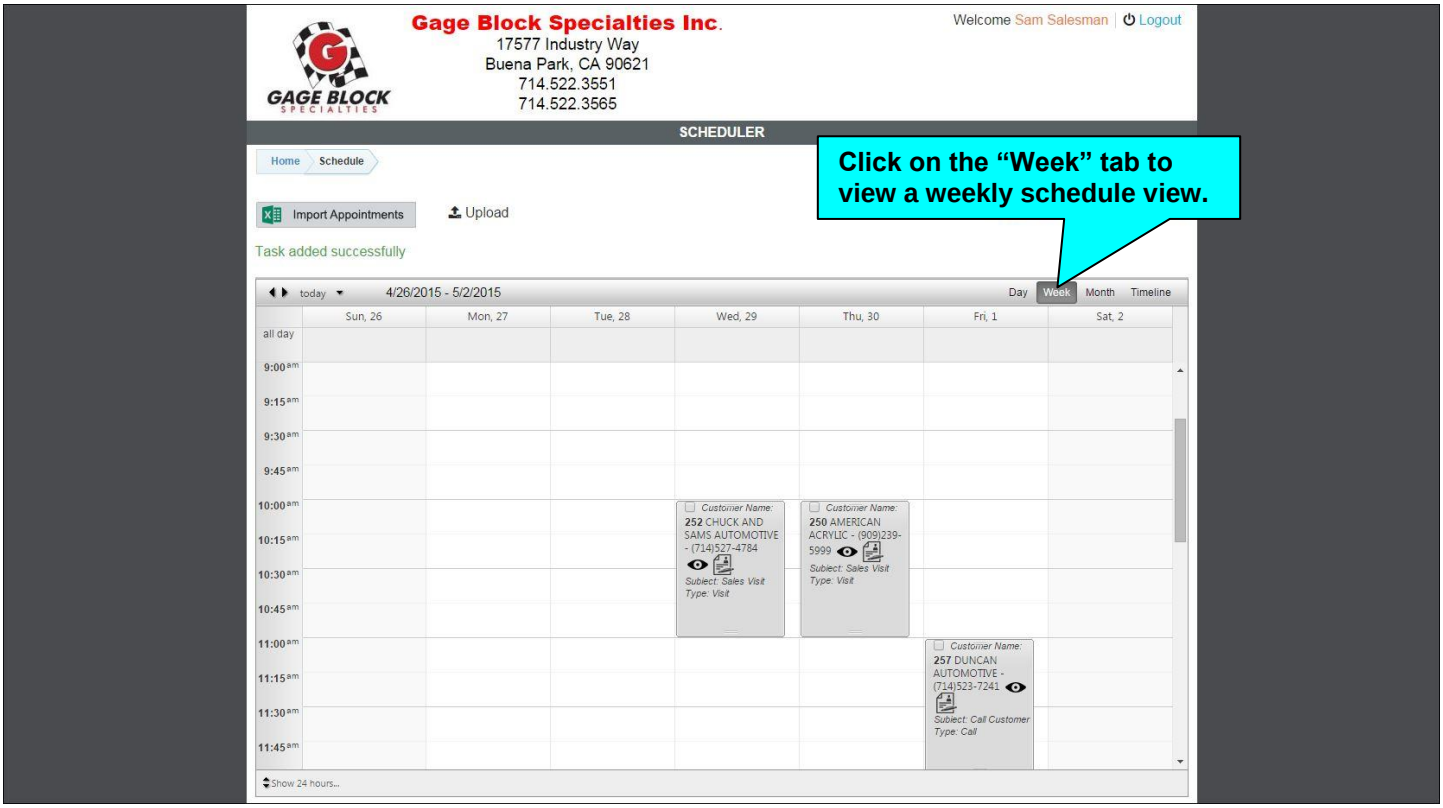
- To delete an existing task under the NON SCHEDULED TASK heading section, click on the trash can (🗑) icon to the right of the task to be deleted. The task entry will then be removed from the screen.

The screen will now display a new blank entry task field below NON SCHEDULED TASK heading.

Week Schedule View

- To have the screen display a weekly schedule view, position the cursor over the Week heading tab and click on it.

The screen will be redrawn as shown:


Gage Block Specialties Inc.
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565
Welcome Sam Salesman | Logout
SCHEDULER
Home Schedule
Import Appointments
Upload
Task added successfully
Click on the "Week" tab to view a weekly schedule view.
today 4/26/2015 - 5/2/2015
Day Week Month Timeline
Sun, 26 Mon, 27 Tue, 28 Wed, 29 Thu, 30 Fri, 1 Sat, 2
all day
9:00am 9:15am 9:30am 9:45am 10:00am 10:15am 10:30am 10:45am 11:00am 11:15am 11:30am 11:45am
Customer Name: 252 CHUCK AND SAMS AUTOMOTIVE - (714)527-4784
Subject: Sales Visit
Type: Visit
Customer Name: 250 AMERICAN ACRYLIC - (909)239-5999
Subject: Sales Visit
Type: Visit
Customer Name: 257 DUNCAN AUTOMOTIVE - (714)523-7241
Subject: Call Customer
Type: Call
Show 24 hours...

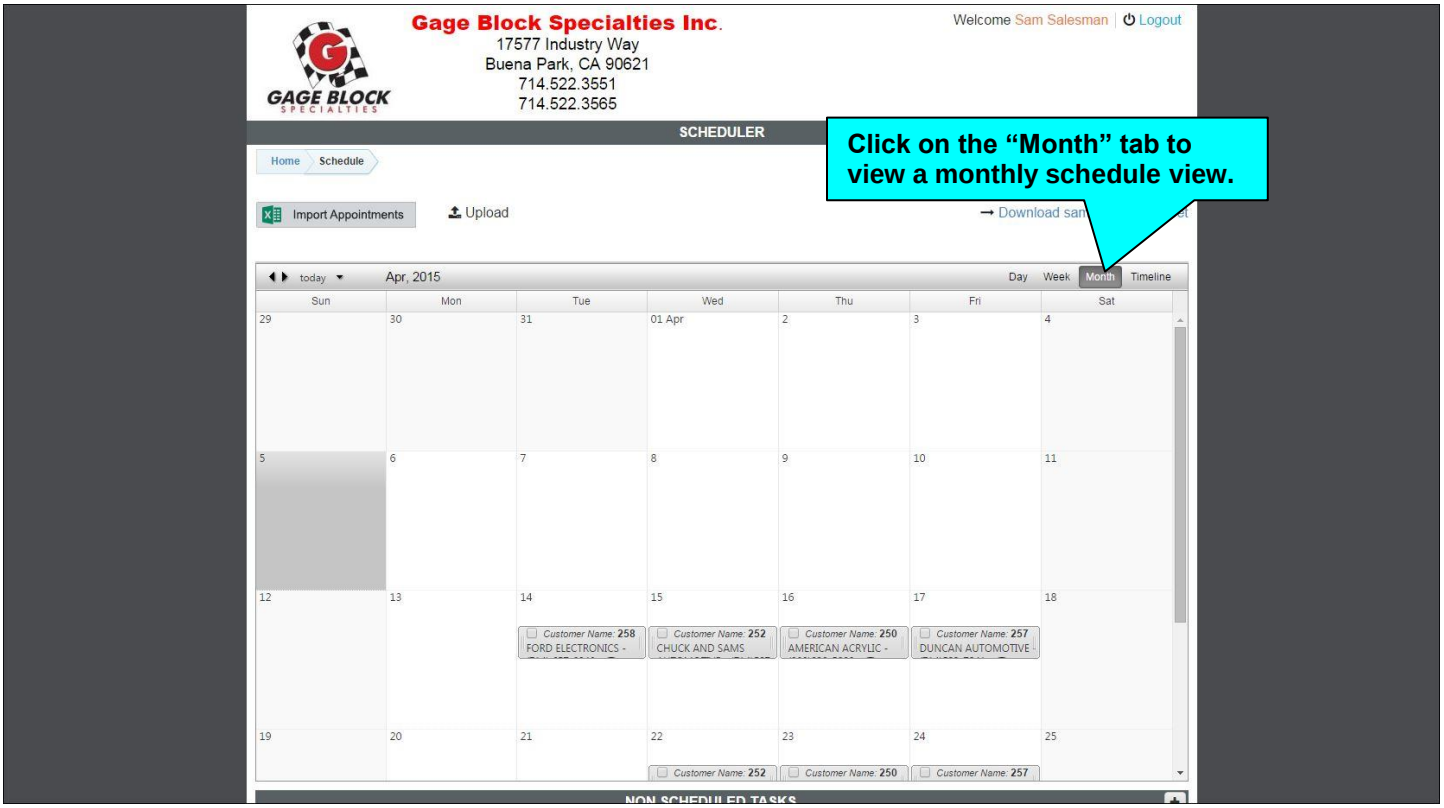
The weekly schedule view shows all appointments only for the current week.

- Click on the left or right arrow buttons of the heading bar to view the previous or next week's schedule information.

Month Schedule View

- To have the screen display a monthly schedule view, position the cursor over the `Month` heading tab and click on it.

The screen will be redrawn as shown:



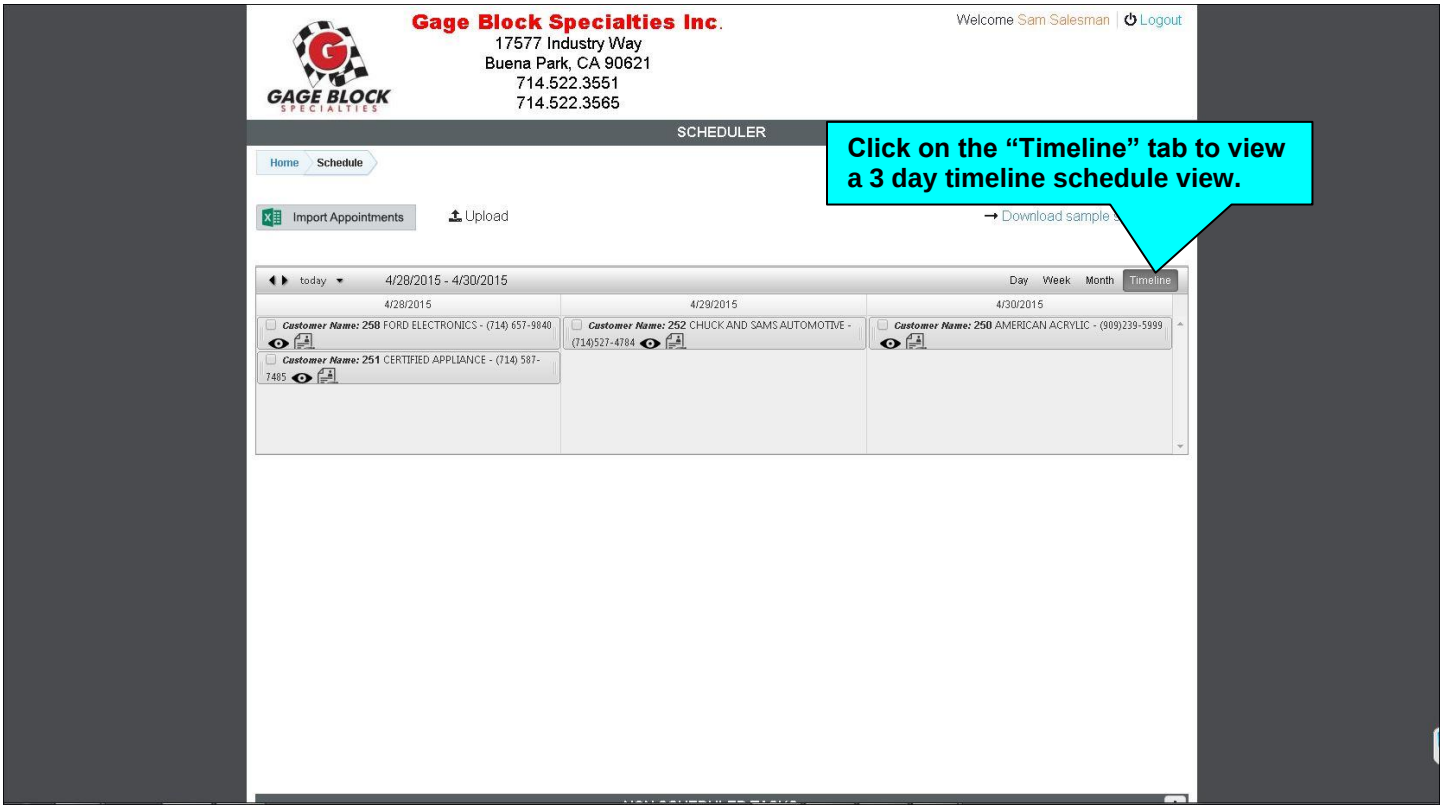
The monthly schedule view shows all appointments only for the current month.

- Click on the left or right arrow buttons of the heading bar to view the previous or next month's schedule information.

Timeline Schedule View

- To have the screen display a three day timeline schedule view, position the cursor over the `Timeline` heading tab and click on it.

The screen will be redrawn as shown:



The timeline schedule view shows all appointments only for a 3 day period.

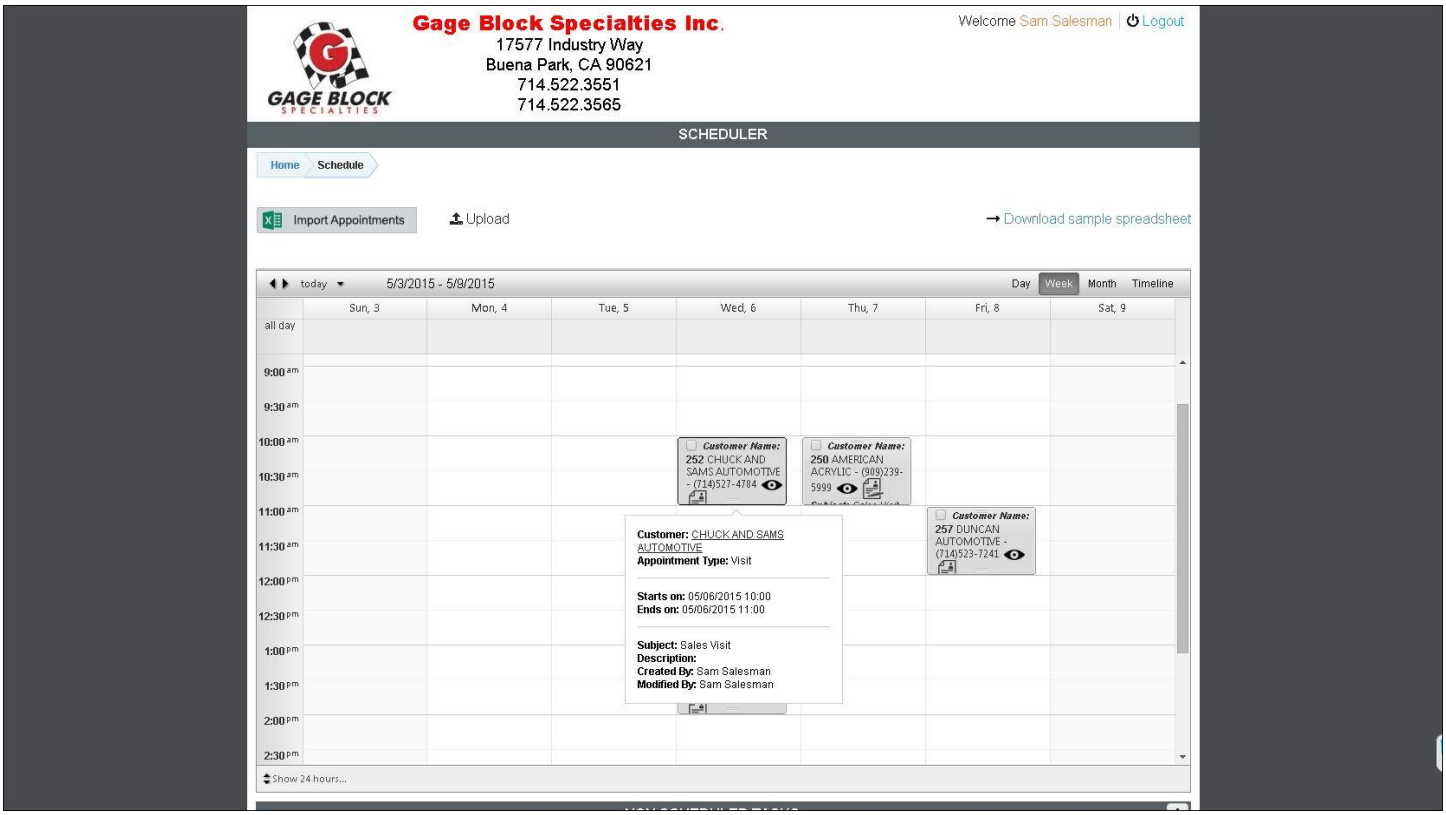
- Click on the left or right arrow buttons of the heading bar to view the previous or next 3 day timeline schedule information.

Viewing Appointment Details

- With the schedule screen displaying appointments in any of the four different views (day, week, month, timeline), you have the ability to view the appointment details by placing the mouse pointer over the grey appointment cell (anywhere except the customer name) and left clicking on it.

☞ **<u>Note:</u> Be sure the mouse pointer stays as an arrow before clicking. If the pointer turns into a finger pointer (☝), it will not display a pop up window of the appointment details!**

The appointment details will pop up on the screen as shown:

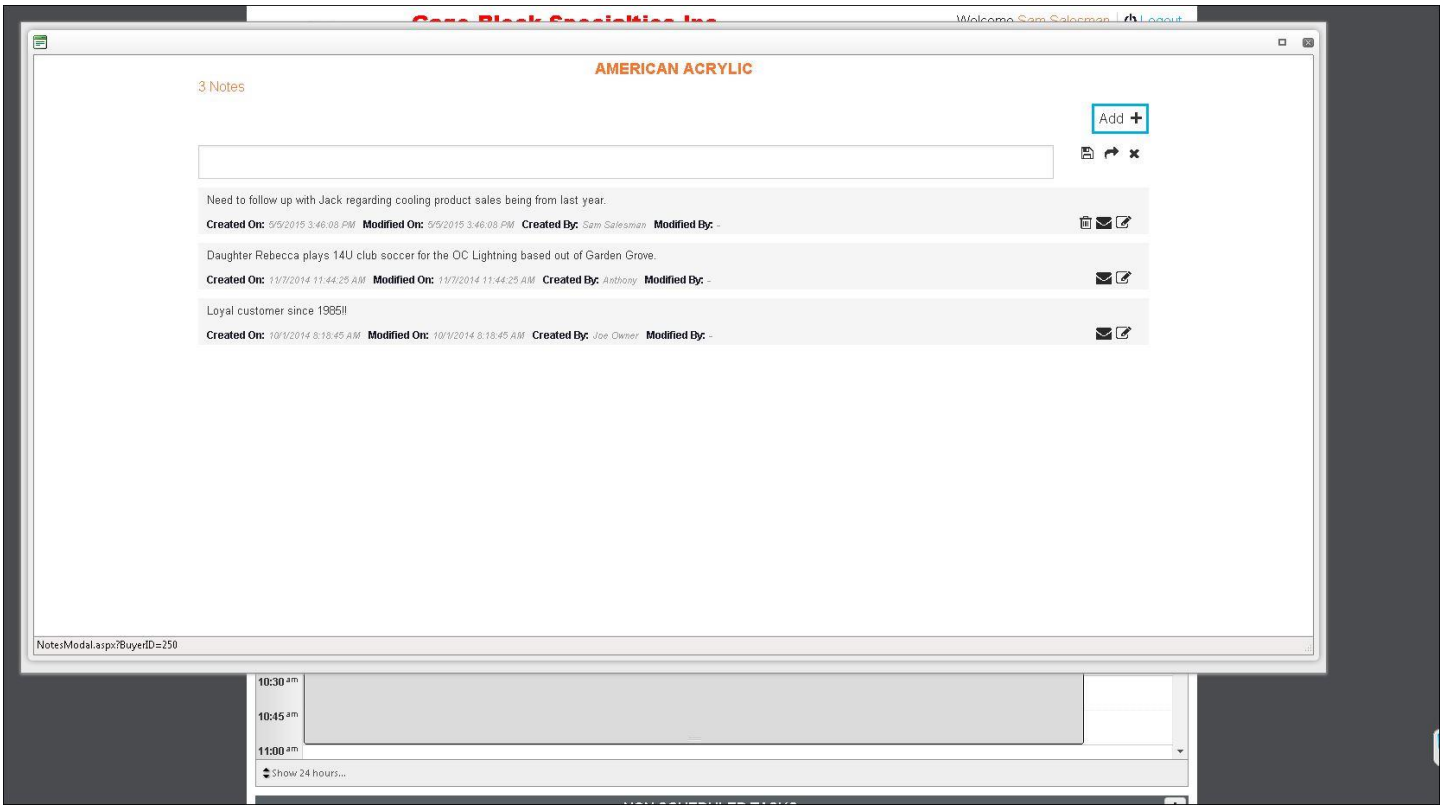


- After viewing the appointment details pop up window, click anywhere else on the screen to remove the pop up window and return back to the scheduler screen.

Entering A Customer Note From An Appointment

- With the schedule screen displaying appointments in the day view, you have the ability to enter a customer note by placing the mouse pointer over the customer notes icon (🗎) and left clicking on it.

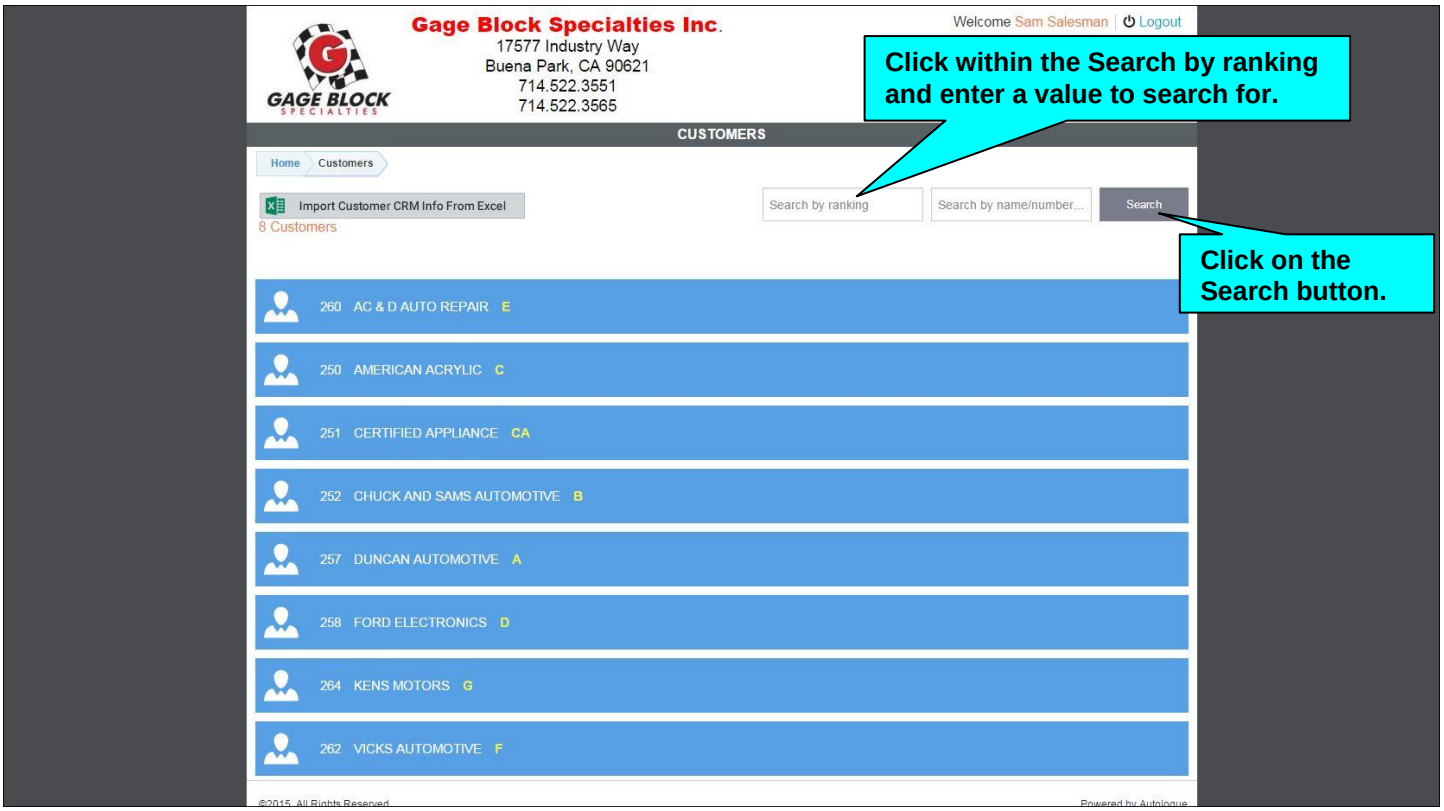
A customer note pop up window will now be displayed on the screen and will display any note entry information for the customer as shown:


AMERICAN ACRYLIC
3 Notes
Add +
Need to follow up with Jack regarding cooling product sales being from last year.
Created On: 5/5/2015 3:46:08 PM Modified On: 5/5/2015 3:46:08 PM Created By: Sam Salesman Modified By: -
Daughter Rebecca plays 14U club soccer for the OC Lightning based out of Garden Grove.
Created On: 11/7/2014 11:44:25 AM Modified On: 11/7/2014 11:44:25 AM Created By: Anthony Modified By: -
Loyal customer since 1985!!
Created On: 10/1/2014 8:18:45 AM Modified On: 10/1/2014 8:18:45 AM Created By: Joe Owner Modified By: -
NotesModal.aspx?BuyerID=250
10:30 am
10:45 am
11:00 am
Show 24 hours...

- A note can be added by clicking on the (Add ✚) button, then clicking within the blank field that is now displayed above all the previous notes information, enter in the new notes information and then clicking on the Save (🖬) icon to save the entered note. You also have the option to both save the entered note and have it emailed by clicking on the Save and Email (➦) icon.
- Existing note entries display the actual note, the creation/last modification dates, and the names of who created/modified the note entry. An existing note entry can be modified by clicking on the edit note (🖉) icon. A note can be emailed by clicking on the envelope (✉) icon. Clicking on the trash can (🗑) icon will delete the note entry.
- Click on the close (☒) icon to close the customer notes pop up window and you will be returned to the schedule screen.

Customer List

- From the salespersons home screen, to access a listing of all their assigned customer accounts, click on the `Customer List` button and the following screen will be displayed:



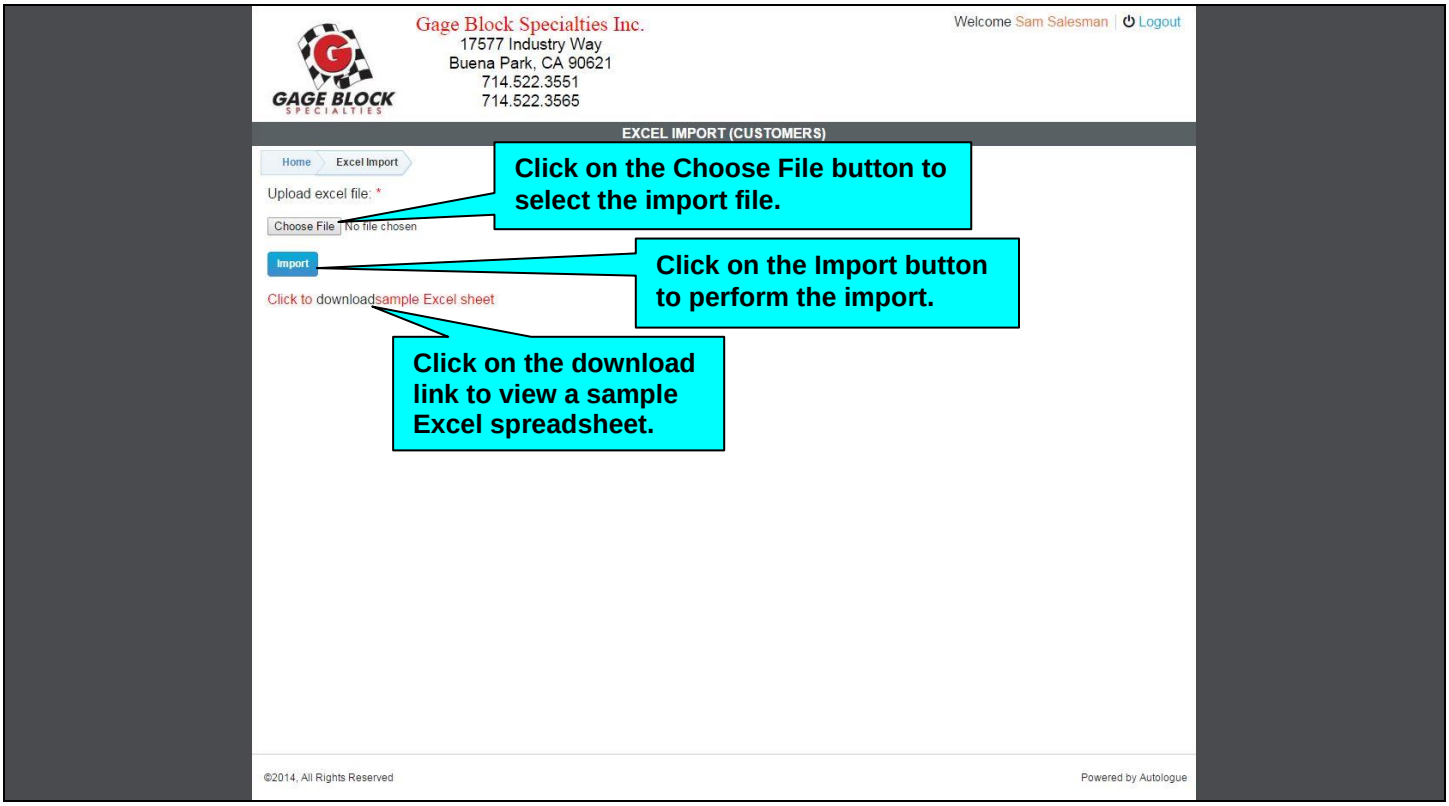
By default, all the salespersons assigned customers are displayed on the screen. Besides each customer name that is listed will be their assigned Ranking code (shown in yellow).

- You have the ability to filter the customer list by entering specific values within the `Search by ranking` and/or `Search by name/number` fields and then clicking on the `Search` button.

Importing Customers From Excel

You have the ability to import your customer's "about" fields information using an Excel spreadsheet.

- Click on the `Import Customer CRM Info from Excel` button and the following screen will be displayed:


Gage Block Specialties Inc.
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565
Welcome Sam Salesman | Logout
EXCEL IMPORT (CUSTOMERS)
Home
Excel Import
Upload excel file: *
Choose File No file chosen
Import
Click to downloadsample Excel sheet
Click on the Choose File button to select the import file.
Click on the Import button to perform the import.
Click on the download link to view a sample Excel spreadsheet.
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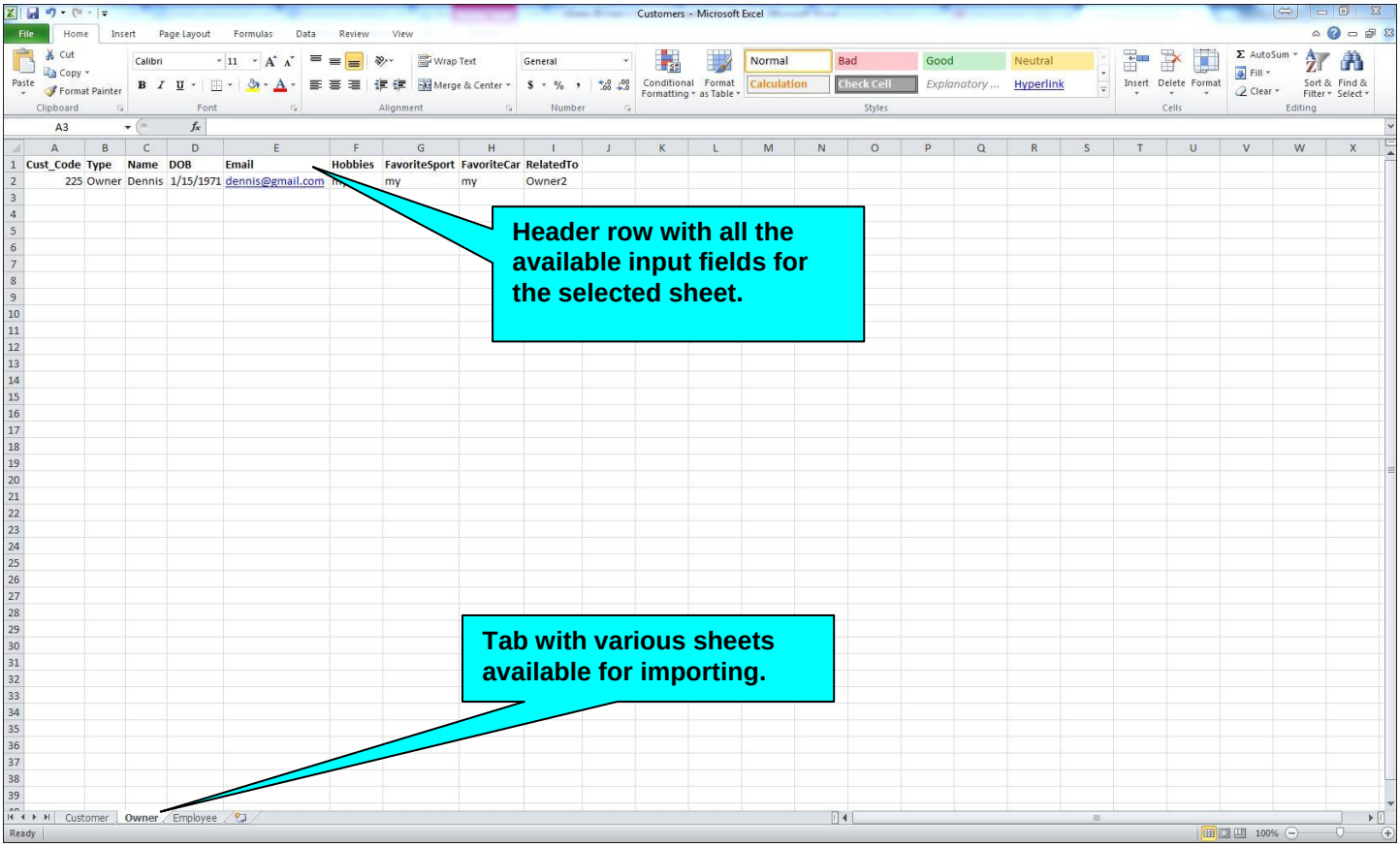
Powered by Autologue

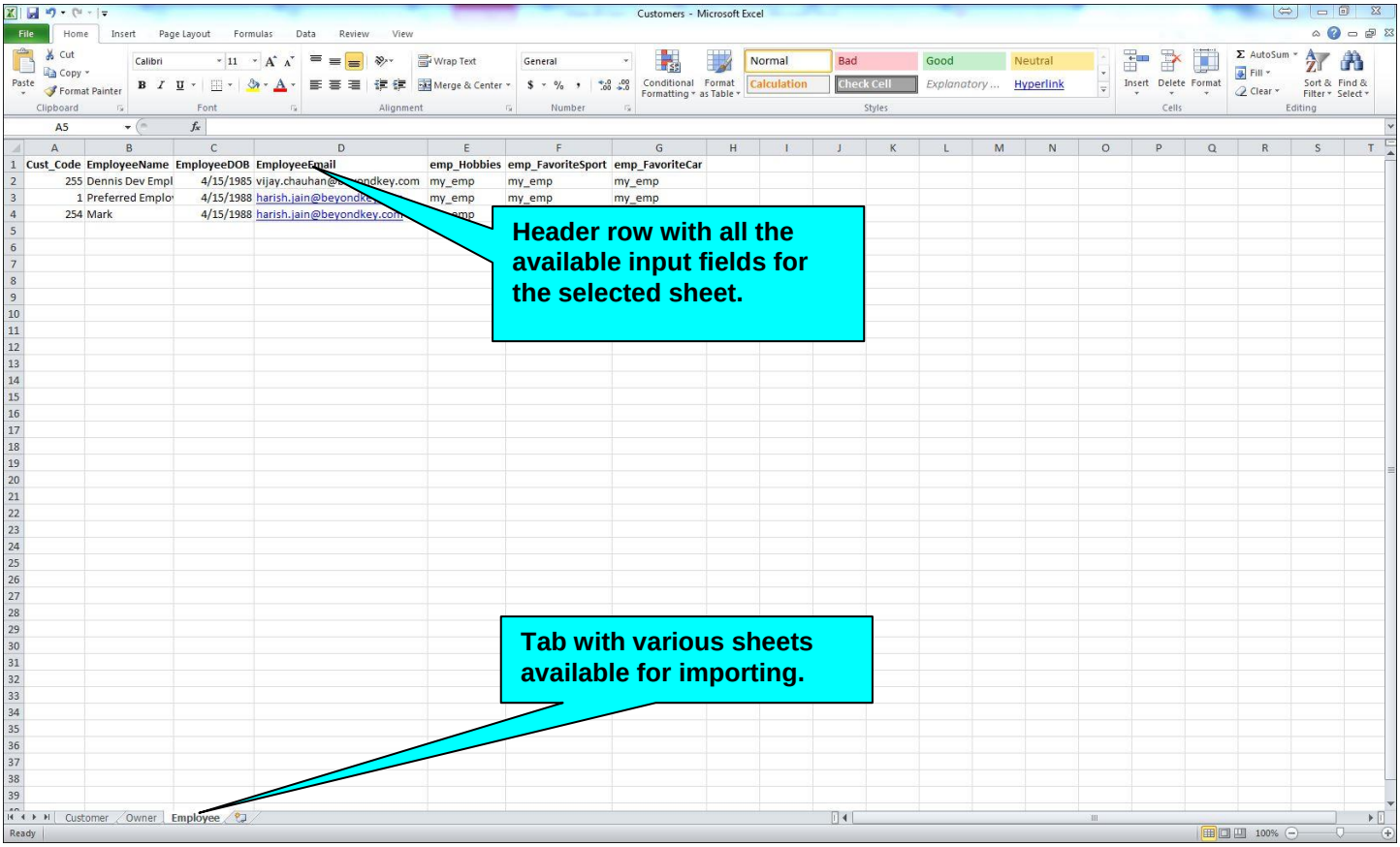
From the *Excel Import (Customers)* screen, you have ability to select a file that can be used to import specific CRM information into existing customers. You also have the ability to download a sample Excel spreadsheet that shows you the "about" fields information that can be used to import into existing customers.

Downloading A Sample Excel Sheet

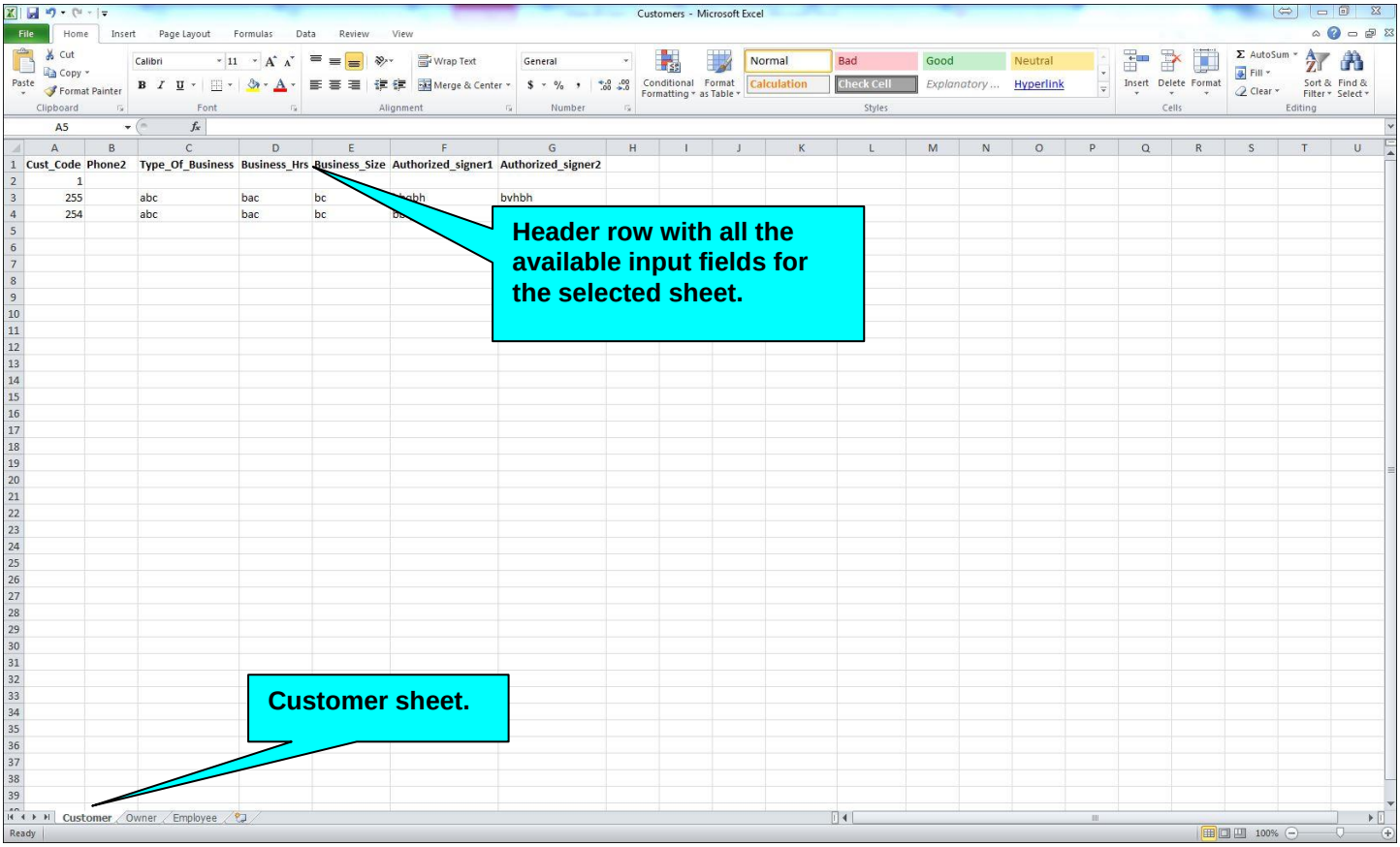
- To download a sample Excel sheet file, click on the *download* link and a *Customers.xlsx* file will be downloaded and saved on the PC. Open the file with Excel to see the list of the available input fields as shown:


Customers - Microsoft Excel
Cust_Code Type Name DOB Email Hobbies FavoriteSport FavoriteCar RelatedTo
225 Owner Dennis 1/15/1971 dennis@gmail.com my my Owner2
Header row with all the available input fields for the selected sheet.
Tab with various sheets available for importing.
Customer Owner Employee
Ready

The sample file can be used as your input file by filling in the rows below the field headings with the customer's "about" information and saving the file under the same or a different filename. It contains 3 different tab sheets (*Owner*, *Employee*, *Customer*) that contain specific field information for each owner, employee, and customer. The sample above shows the field headings and their sample contents for the *Owner* tab.



The sample above shows the field headings and their sample contents for the *Employee* tab.



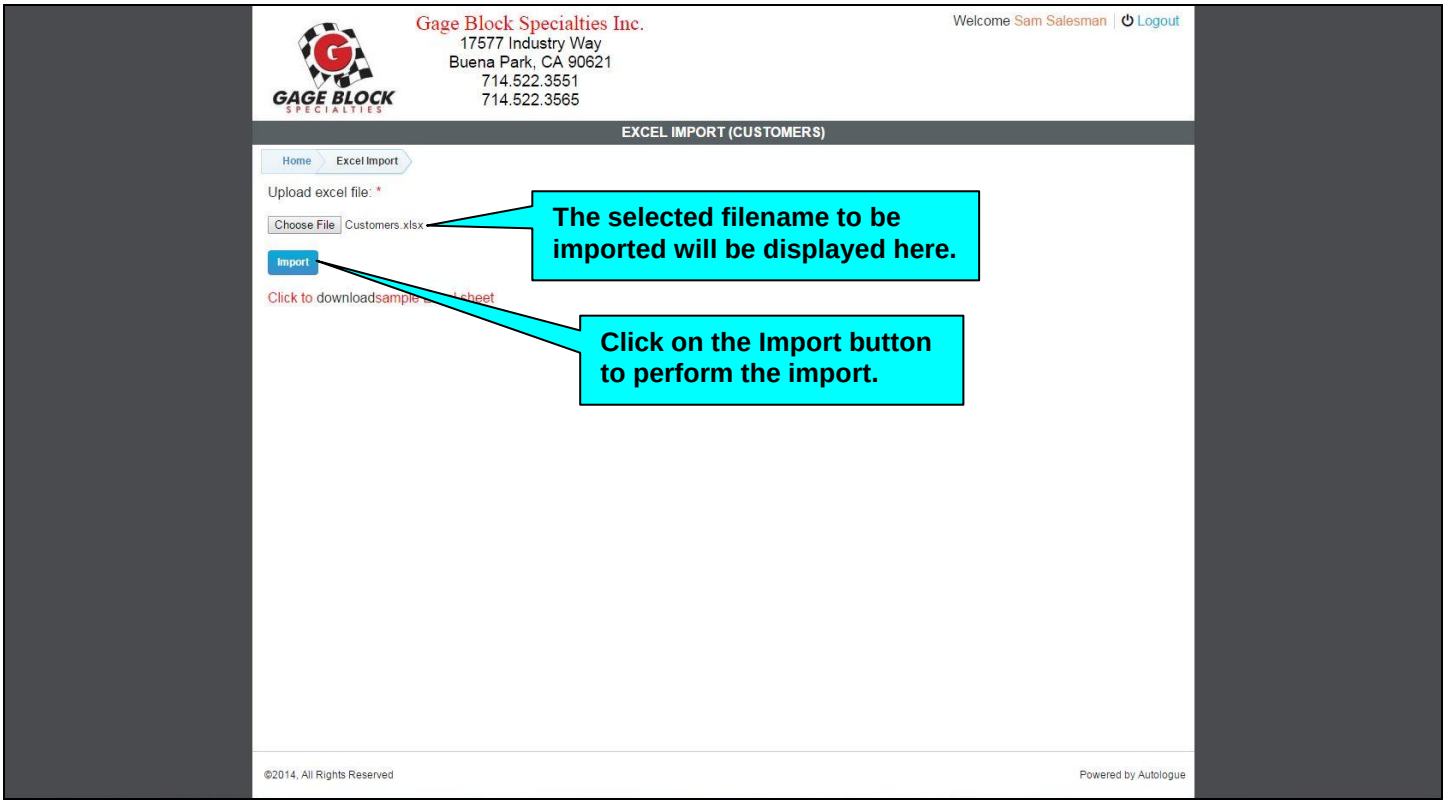
Cust_Code	Phone2	Type_Of_Business	Business_Hrs	Business_Size	Authorized_signer1	Authorized_signer2
1						
255		abc	bac	bc	bvhbh	bvhbh
254		abc	bac	bc	bv	

The sample above shows the field headings and their sample contents for the *Customer* tab.

- Click within the next open row to begin entering information under the respective field headings for each of the specific sheets and then save the file as an Excel workbook (including all 3 tab sheets).

Choosing A File To Import

- From the *Excel Import (Customers)* screen, click on the `Choose File` button and open the excel file to be imported. The selected filename will now be displayed to the right of the `Choose File` button.



- Click on the blue `Import` button to perform the uploading of field information.

Once the importing process is completed, the screen will display an "*N out of N Record(s) are imported successfully*" message which tells you how many records were successfully uploaded into each of the respective sheets.

Customer Navigation

- From the *CUSTOMERS* home screen and the list of customers being displayed, click on the customers blue bar and the following screen will be displayed:

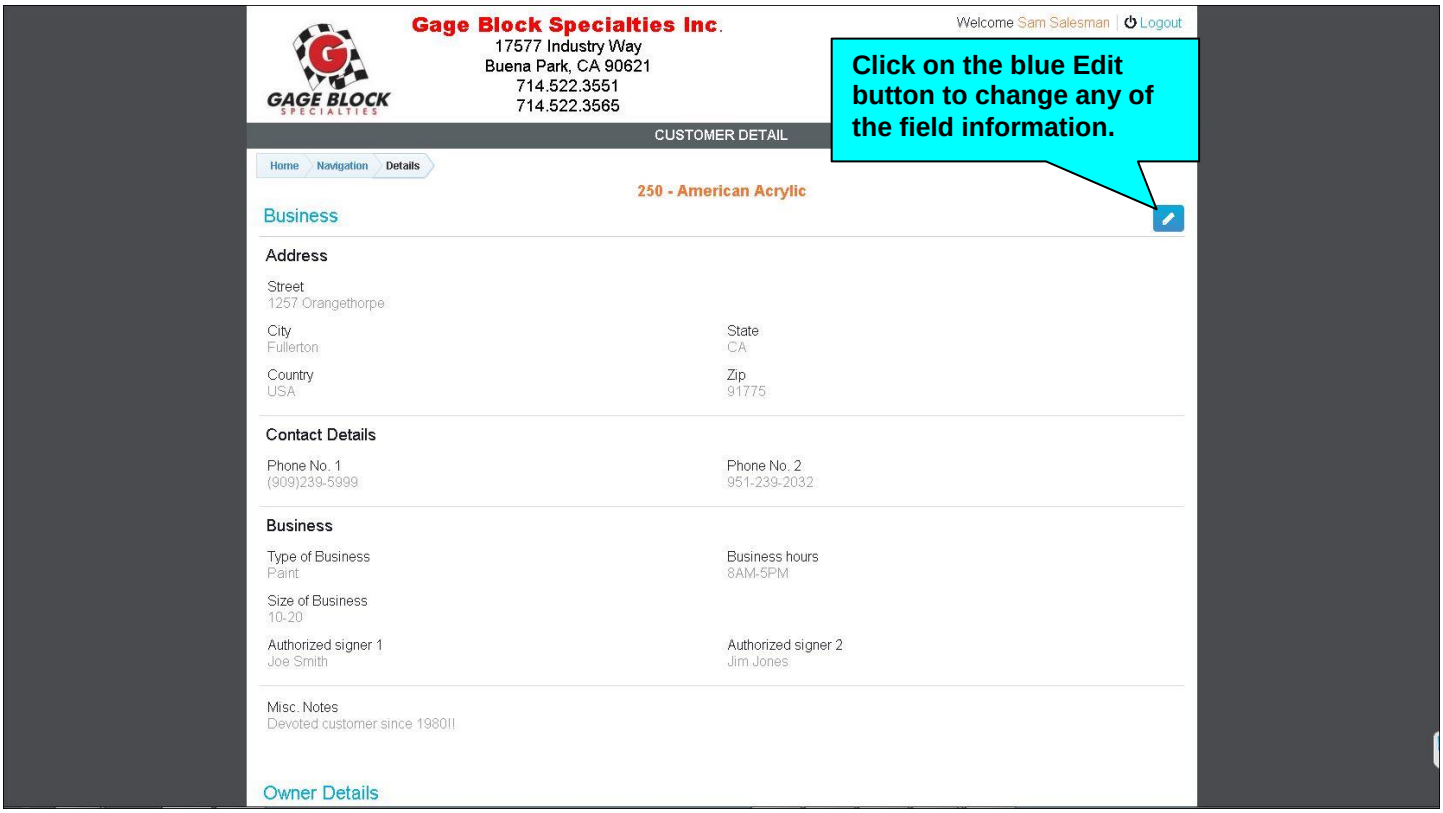
The *CUSTOMER NAVIGATION* screen will now be displayed for the selected customer (whose customer number, name and phone number is displayed above the colored menu blocks).

Here the salesperson has the ability to perform the following:

• View/Add additional business & personal information for the customer (About Customers)	• Automatically login to ePartConnection as the customer
• Automatically login to eOffice as the customer	• View a sales dashboard (Business Intelligence)
• View/Add customer notes information	

About Customers

- From the *CUSTOMER NAVIGATION* screen, click on the `About Customers` colored menu block and the following screen will be displayed:

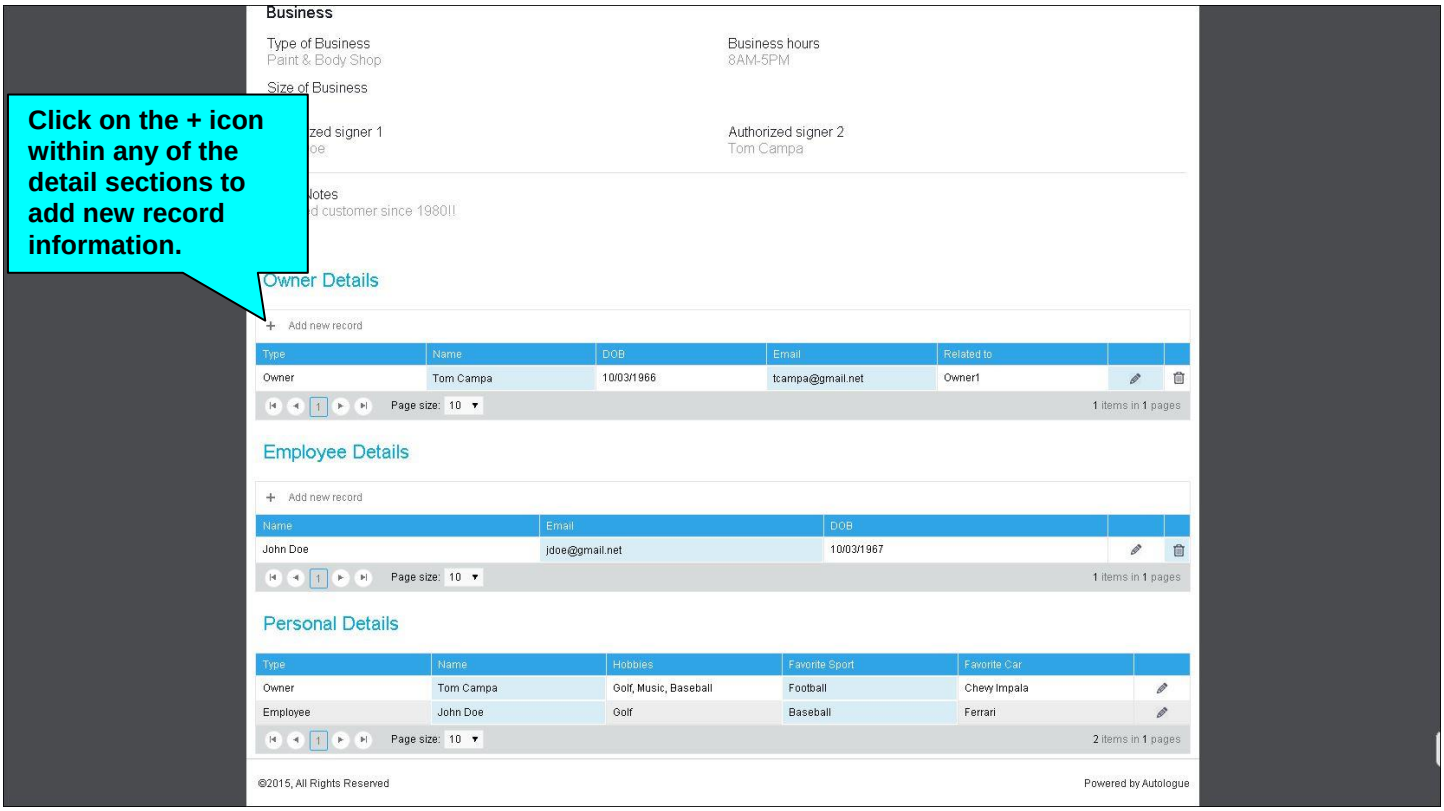


The *CUSTOMER DETAIL* screen will be displayed and will be displaying the entered business information (address, phone numbers, business type/hours/size, authorized signers and notes) for the selected customer.

- To edit any of the existing business information, click on the blue edit (✎) icon, and then click within any of the fields within the *Contact Details* & *Business* sections and make your changes and then click on the blue save button.

☞ **<u>Note:</u> The Phone No. 1 field cannot be edited; It can only be changed within the *ePart Setup – Customer Options*.**

- At the bottom of the screen are *Owner/Employee/Personal Details* heading sections. These sections are used to enter in your customer's owners as well as their employees CRM information:



- To add CRM record information within any of the listed sections, click on the (✚) symbol within their respective detail sections and the screen will now display a new row of blank entry fields. Enter in the details information (type, name, date of birth, email, relationship, hobbies, favorite sport, favorite car) and then click on the (✓) symbol to save the entered information.
- To edit CRM record information within any of the listed sections, click on the (✎) symbol besides the row of fields information and the fields will now be shown as entry fields. Edit any of the details information and then click on the (✓) symbol to save the updated information.

ePartConnection

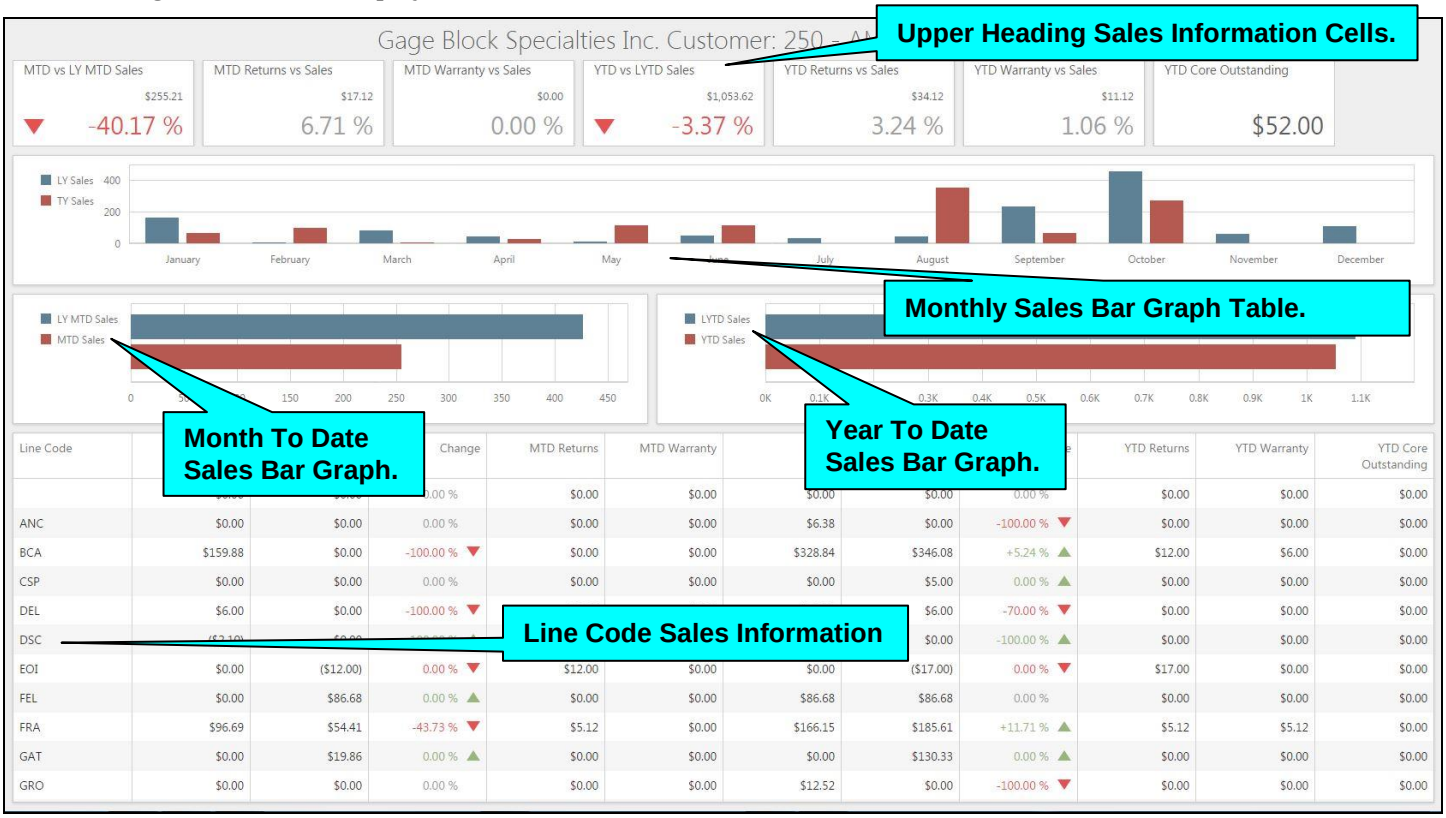
- From the CUSTOMER NAVIGATION screen, click on the ePartConnection colored menu block and a new webpage tab will be opened and you will be automatically logged into the customer's account within ePartConnection.

eOffice

- From the CUSTOMER NAVIGATION screen, click on the eOffice colored menu block and a new webpage tab will be opened and you will be automatically logged into the customer's account within eOffice.

Business Intelligence

- From the *CUSTOMER NAVIGATION* screen, click on the `Business Intelligence` colored menu block and the following screen will be displayed:


Upper Heading Sales Information Cells.
Monthly Sales Bar Graph Table.
Month To Date Sales Bar Graph.
Year To Date Sales Bar Graph.
Line Code Sales Information

This screen is a graphical "sales dashboard" of the customers sales from the past year on up through the current date. It displays a variety of graphed sales figures as well as dollar values for the various types of returns (core/inventory/warranty). It also shows the percentage changes (positive/negative) based up comparisons from last year versus this year sales. The screen is broken up in 4 sections:

1. Upper Heading Sales Information Cells
2. Monthly Sales Bar Graph Table
3. Month/Year To Date Sales Bar Graphs
4. Line Code Sales Information

Upper Heading Sales Information Cells Section

Heading	Description
MTD vs LY MTD Sales	Shows the Month To Date (MTD) sales dollar amount and the percentage difference when compared to Last Year (LY) Month To Date (MTD) sales dollar amount. The small dollar amount displayed is the current month to date sales. The large percentage figure displayed will either show in red if the percentage is down (denoted by the red down arrow) or in green if the percentage is up (denoted by the green up arrow). To view the Last Year (LY) Month To Date (MTD) sales dollar amount, hover over either of the bar graphs within the Month To Date Sales Bar graph section of the screen.

MTD Returns vs Sales	Shows the Month To Date (MTD) inventory returns dollar amount and its percentage when compared to the Month To Date sales dollar amount. The small dollar amount displayed is the current month to date inventory returns sales. The large grey percentage figure is the return percentage (MTD Returns ÷ MTD Sales*100).
MTD Warranty vs Sales	Shows the Month To Date (MTD) warranty returns dollar amount and its percentage when compared to Month To Date sales dollar amount. The small dollar amount displayed is the current month to date warrant returns sales. The large grey percentage figure is the warranty return percentage (MTD Warranty ÷ MTD Sales*100).
YTD vs LYTD Sales	Shows the Year To Date (YTD) sales dollar amount and the percentage difference when compared to Last Year To Date (LYTD) sales dollar amount. The small dollar amount displayed is the current year to date sales. The large percentage figure displayed will either show in red if the percentage is down (denoted by the red down arrow) or in green if the percentage is up (denoted by the green up arrow). To view the Last Year To Date (LYTD) sales dollar amount, hover over either of the bar graphs within the Year To Date Sales Bar graph section of the screen.
YTD Returns vs Sales	Shows the Year To Date (YTD) inventory returns dollar amount and its percentage when compared to the Year To Date sales dollar amount. The small dollar amount displayed is the current year to date inventory returns sales. The large grey percentage figure is the return percentage (YTD Returns ÷ YTD Sales*100).
YTD Warranty vs Sales	Shows the Year To Date (YTD) warranty returns dollar amount and its percentage when compared to Year To Date sales dollar amount. The small dollar amount displayed is the current year to date warrant returns sales. The large grey percentage figure is the warranty return percentage (YTD Warranty ÷ YTD Sales*100).
YTD Core Outstanding	Shows the Year To Date (YTD) outstanding cores dollar amount. This represents the amount of cores charged for and not yet returned.

Monthly Sales Bar Graph Table Section

The second section of the screen, just below the upper heading cells section, displays the monthly sales bar graph data for current and last year's sales dollars.

☞ **Note: A pop up window showing the exact dollar figures is automatically displayed whenever you "hover" the mouse pointer over any of bar code graphs.**

Month/Year To Date Sales Bar Graphs Section

The third section of the screen, just below the monthly sales bar graph section, displays the month and year to date sales dollars versus last month and current sales dollars to date.

☞ **Note: These figures are based on "to date" which means if we are 15 days into the current month and 180 days into the current year, the LY (last year) MTD (month to date) and YTD (year to date) sales figures are based upon those day amounts.**

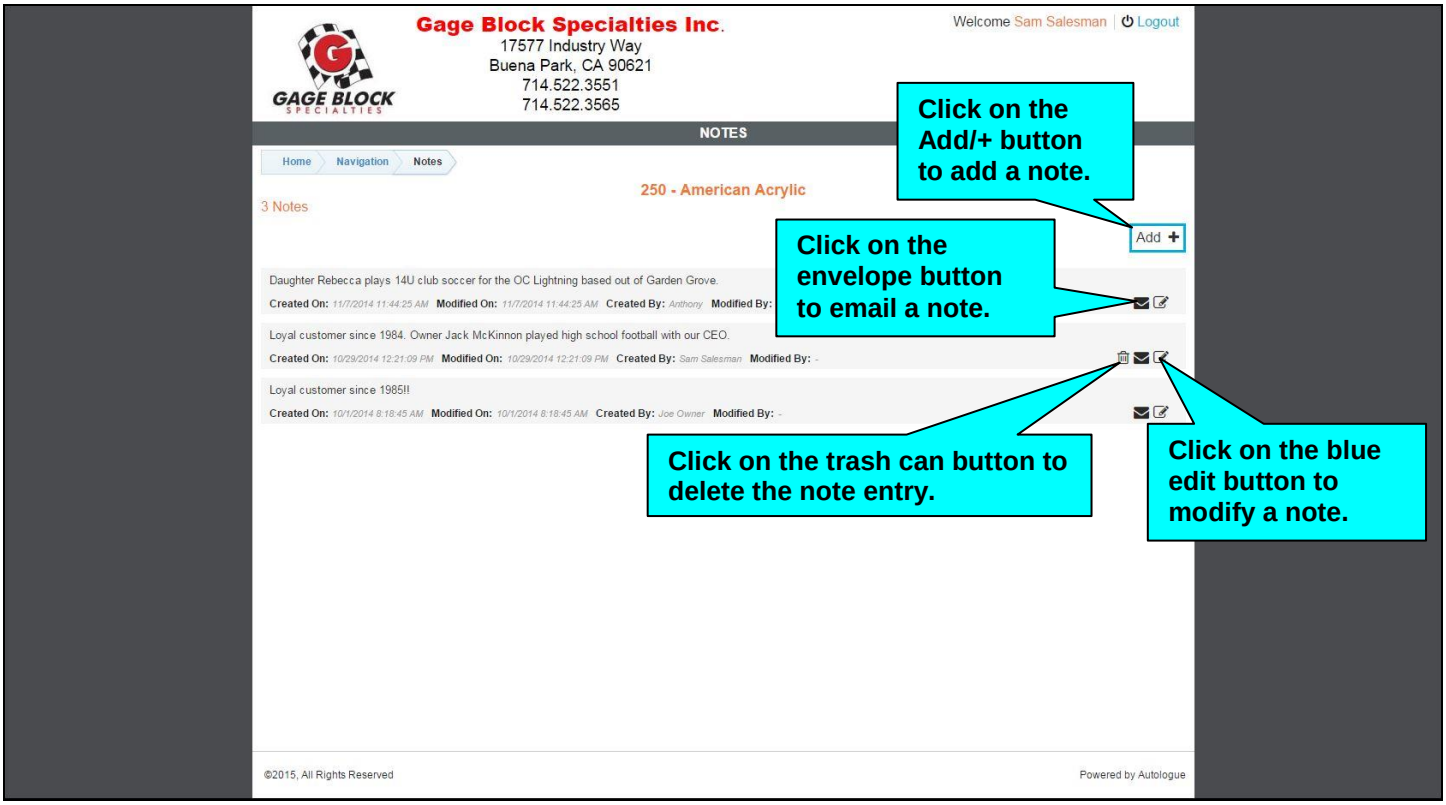
Line Code Sales Information Section

Heading	Description
Line Code	The line code of the parts sold to the customer.
LY MTD	Shows the Last Year (LY) Month To Date (MTD) sales dollar amount for the line code.
MTD	Shows the Month To Date (MTD) sales dollar amount for the line code.
Change	Shows the percentage difference when comparing the Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) sales dollar amounts.
MTD Returns	Shows the Month To Date (MTD) inventory returns dollar amount.
MTD Warranty	Shows the Month To Date (MTD) warranty returns dollar amount.
LYTD	Shows the Last Year To Date (LYTD) sales dollar amount for the line code.
YTD	Shows the Year To Date (LYTD) sales dollar amount for the line code.

Change	Shows the percentage difference when comparing the Year To Date (YTD) versus Last Year To Date (LYTD) sales dollar amounts.
YTD Returns	Shows the Year To Date (YTD) inventory returns dollar amount.
YTD Warranty	Shows the Year To Date (YTD) warranty returns dollar amount.
YTD Core Outstanding	Shows the Year To Date (YTD) outstanding cores dollar amount. This represents the amount of cores charged for and not yet returned.

Notes

- From the *CUSTOMER NAVIGATION* screen, click on the `Notes` colored menu block and the screen will display any note entry information for the customer as shown:


Gage Block Specialties Inc.
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565
Welcome Sam Salesman | Logout
NOTES
Home
Navigation
Notes
250 - American Acrylic
3 Notes
Add +
Daughter Rebecca plays 14U club soccer for the OC Lightning based out of Garden Grove.
Created On: 11/7/2014 11:44:25 AM Modified On: 11/7/2014 11:44:25 AM Created By: Anthony Modified By:
Loyal customer since 1984. Owner Jack McKinnon played high school football with our CEO.
Created On: 10/29/2014 12:21:09 PM Modified On: 10/29/2014 12:21:09 PM Created By: Sam Salesman Modified By: -
Loyal customer since 1985!!
Created On: 10/1/2014 8:18:45 AM Modified On: 10/1/2014 8:18:45 AM Created By: Joe Owner Modified By: -
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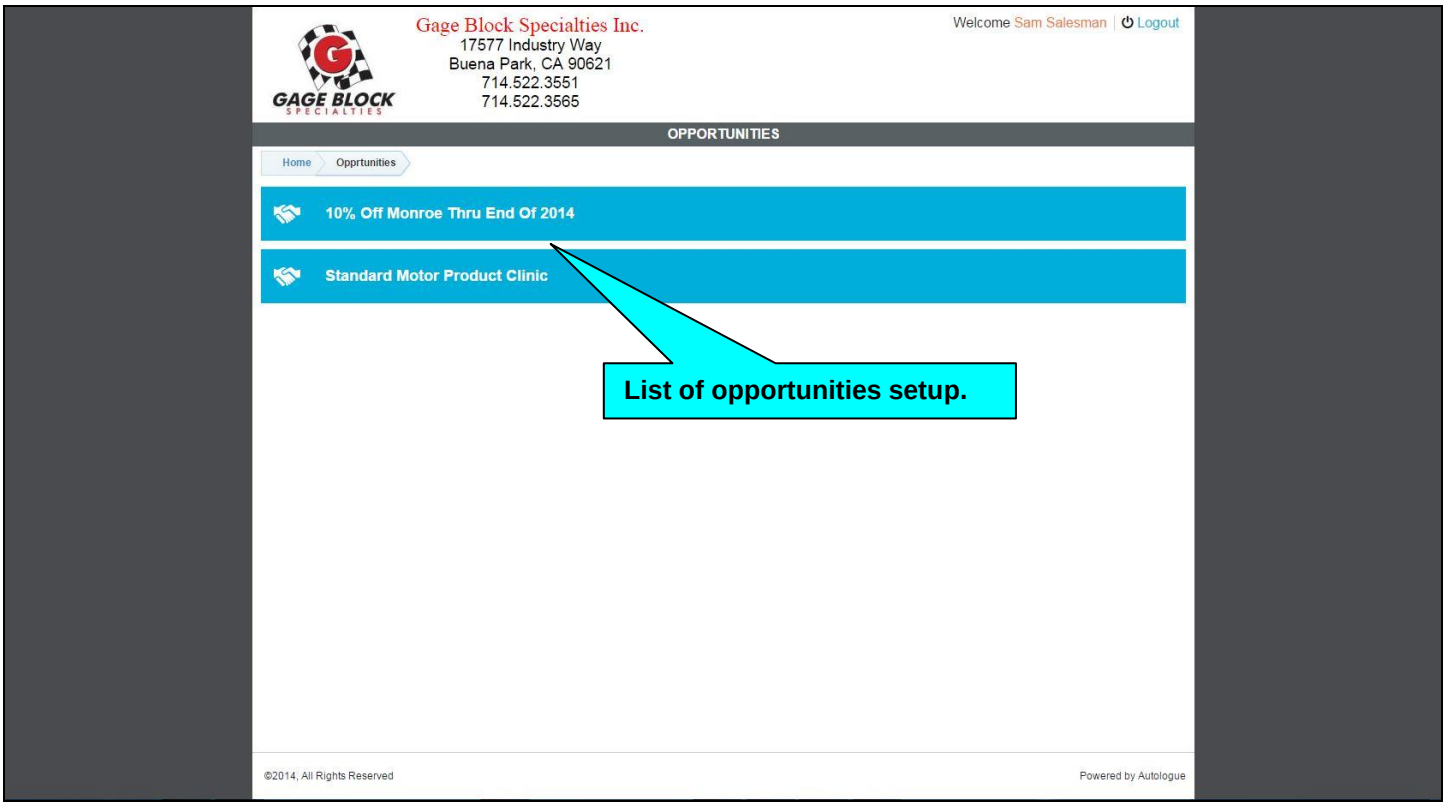
Powered by Autologue
Click on the Add/+ button to add a note.
Click on the envelope button to email a note.
Click on the trash can button to delete the note entry.
Click on the blue edit button to modify a note.

The note entry displays the actual note, the creation/last modification dates, and the names of who created/modified the note entry. A note can be added by clicking on the (Add ✚) button. The existing note entry can be modified by clicking on the edit note (✎) icon. A note can be emailed by clicking on the envelope (✉) icon. Clicking on the trash can (🗑) icon will delete the note entry.

Opportunities

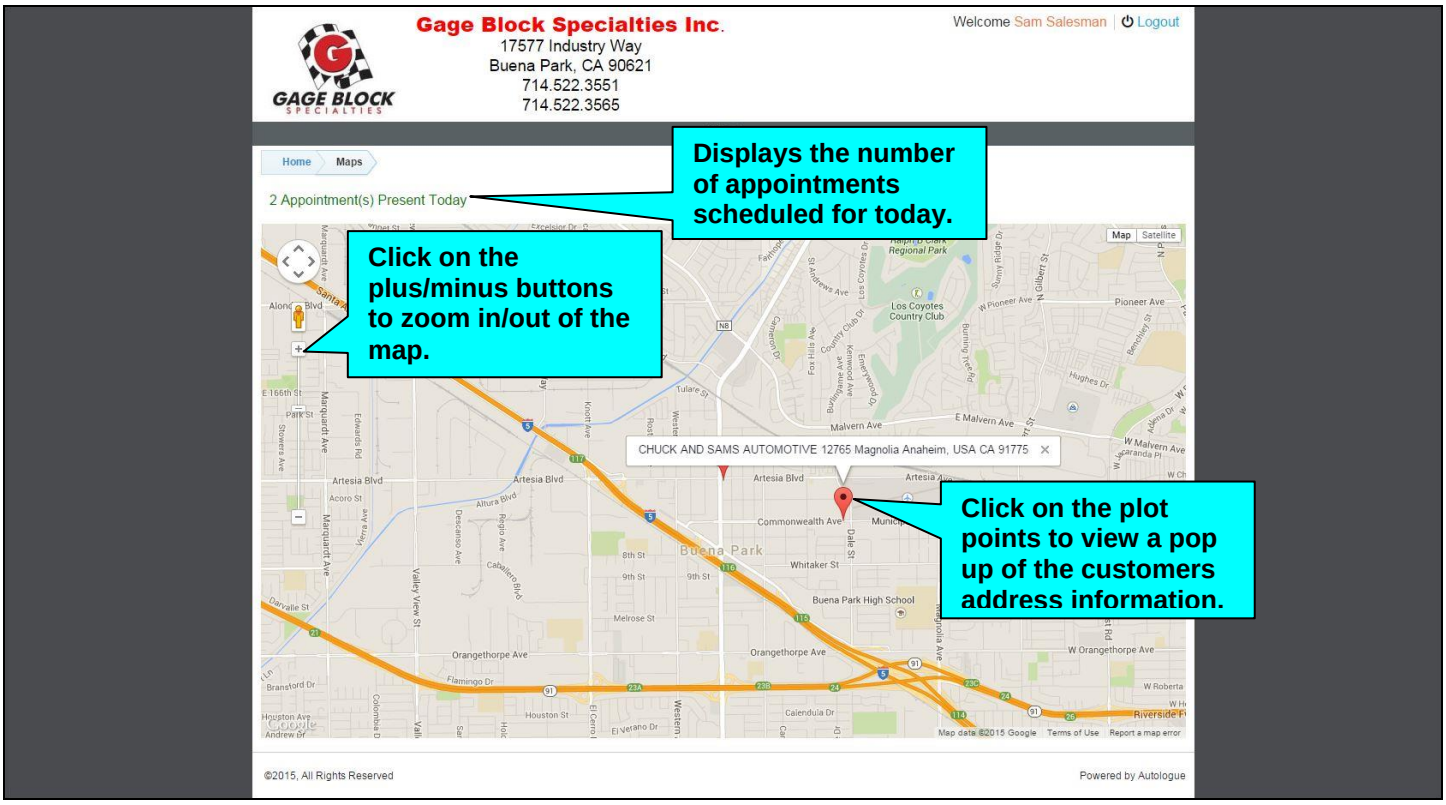
- From the salespersons home screen, to access a listing of opportunities that have been setup by management, click on the `Opportunities` button and the following screen will be displayed:



The opportunities can be reminders of important information or can be links to web pages. This information is setup within the *Manage opportunities* section of the *Setup ePartConnection* webpage.

Map

- From the salespersons home screen, to view a map of their scheduled appointments for the current day, click on the `Map` button and the following screen will be displayed:



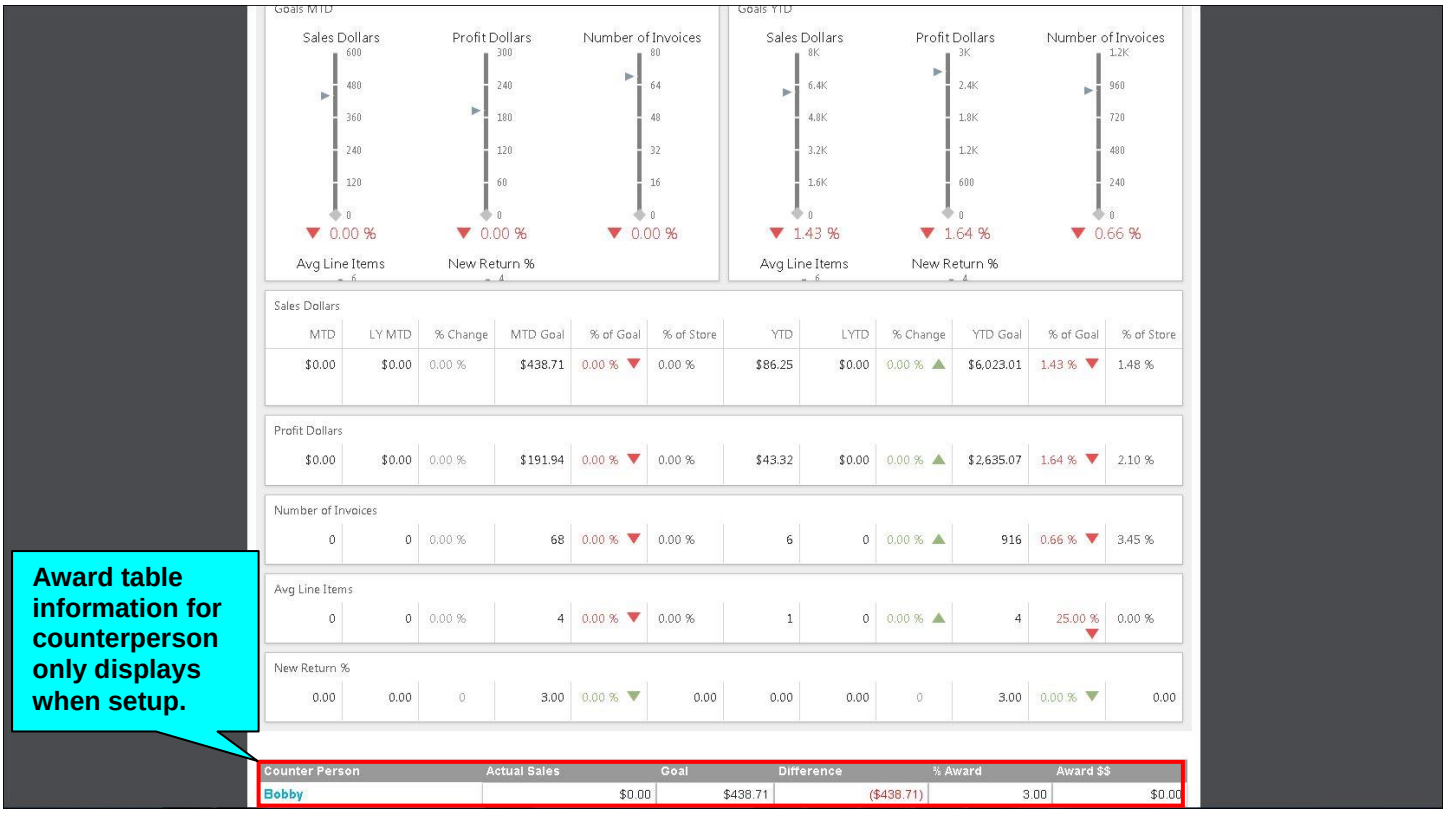
By default, the screen will display a map plotting the locations of the customers who are scheduled for appointments for the day.

The top of the map will display the number of appointments that are scheduled for the current day.

- Clicking on the plus (+) will zoom in or on the minus (-) will zoom out.
- Click on any of the plot points to see a pop up window that shows the Customer's name and address information.

Counterman Login Screen

When a counterman has logged in using their counterman password, the following screen will be displayed:


Goals MTD
Sales Dollars
Profit Dollars
Number of Invoices
0.00 %
0.00 %
0.00 %
Avg Line Items
New Return %
Goals YTD
Sales Dollars
Profit Dollars
Number of Invoices
1.43 %
1.64 %
0.66 %
Avg Line Items
New Return %
Sales Dollars
MTD LY MTD % Change MTD Goal % of Goal % of Store YTD LYTD % Change YTD Goal % of Goal % of Store
$0.00 $0.00 0.00 % $438.71 0.00 % 0.00 % $86.25 $0.00 0.00 % $6,023.01 1.43 % 1.48 %
Profit Dollars
$0.00 $0.00 0.00 % $191.94 0.00 % 0.00 % $43.32 $0.00 0.00 % $2,635.07 1.64 % 2.10 %
Number of Invoices
0 0 0.00 % 68 0.00 % 0.00 % 6 0 0.00 % 916 0.66 % 3.45 %
Avg Line Items
0 0 0.00 % 4 0.00 % 0.00 % 1 0 0.00 % 4 25.00 % 0.00 %
New Return %
0.00 0.00 0 3.00 0.00 % 0.00 0.00 0.00 0 3.00 0.00 % 0.00
Award table information for counterperson only displays when setup.
Counter Person Actual Sales Goal Difference % Award Award $$
Bobby $0.00 $438.71 ($438.71) 3.00 $0.00

This is the counterman's home screen. Here the counterman has the ability to perform the following:

• View a sales dashboard of his performance against monthly & yearly sales goals; When setup, view award percentage and dollar amount earned (only is displayed when setup)	• Display a list of all customers
• View alerts & notifications	• View opportunities
• Schedule – View their scheduled calls/visits on the calendar by date selection	• View a map plotting the locations of the customers who have scheduled appointments for the day

Sales Dashboard

Outlined below are the different sections of the counterman's sales dashboard screen and an explanation of each. This screen contains a graphical "sales dashboard" of the counterman's sales from the past year on up through the current date. It displays a variety of graphed sales figures as well as dollar values for the amount of returns. It also shows the percentage changes (positive/negative) based up the current sales figures versus the projected sales goals. If setup, will show an award table that contains the actual sales amount, goal amount, the difference (goal – actual), award percentage and the award dollar amount earned when the sales goal has been met. Note: The award table only displays when setup.

Goals MTD (Month To Date)

This section displays line graphs that reflect the current month to date values (denoted by the light grey diamond ♦) versus the projected goal values (denoted by the light blue pointer ►) for the following:

- Sales Dollars
- Number of Invoices
- Percent Returns
- Profit Dollars
- Avg Line Items

Clicking within the screen section allows you to scroll up/down to view all the sales graph information.

Goals YTD (Year To Date)

This section displays line graphs that reflect the current year to date values (denoted by the light grey diamond ♦) versus the projected goal values (denoted by the light blue pointer ►) for the following:

- Sales Dollars
- Number of Invoices
- Percent Returns
- Profit Dollars
- Avg Line Items

Clicking within the screen section allows you to scroll up/down to view all the sales graph information.

Sales Dollars

The Sales Dollars section contains the following information:

Heading	Description
MTD	Shows the Month To Date (MTD) sales dollar amount. Denoted by the light grey diamond ♦ symbol within the Goals MTD screen section.
LY MTD	Shows Last Years (LY) Month To Date (MTD) sales dollar amount.
% Change	Shows the percentage difference when comparing Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) sales dollar amounts.
MTD Goal	Shows the Month To Date (MTD) sales dollars goal. Denoted by the light blue pointer ► symbol within the Goals MTD screen section.
% of Goal	Shows the percentage when comparing Month To Date (MTD) versus MTD Goal sales dollar amounts.
% of Store	Shows the percentage when comparing Month To Date (MTD) versus MTD store sales dollar amounts.
YTD	Shows the Year To Date (YTD) sales dollar amount. Denoted by the light grey diamond ♦ symbol within the Goals YTD screen section.
LY YTD	Shows Last Years (LY) Year To Date (YTD) sales dollar amount.
% Change	Shows the percentage difference when comparing Year To Date (YTD) versus Last Year (LY) Year To Date (YTD) sales dollar amounts.
YTD Goal	Shows the Year To Date (YTD) sales dollars goal. Denoted by the light blue pointer ► symbol within the Goals YTD screen section.
% of Goal	Shows the percentage when comparing Year To Date (YTD) versus YTD Goal sales dollar amounts.
% of Store	Shows the percentage when comparing Year To Date (YTD) versus YTD store sales dollar amounts.

Profit Dollars

The Profit Dollars section contains the following information:

Heading	Description
MTD	Shows the Month To Date (MTD) profit dollar amount. Denoted by the light grey diamond ♦ symbol within the Goals MTD screen section.
LY MTD	Shows Last Years (LY) Month To Date (MTD) profit dollar amount.

% Change	Shows the percentage difference when comparing Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) profit dollar amounts.
MTD Goal	Shows the Month To Date (MTD) profit dollars goal. Denoted by the light blue pointer ► symbol within the Goals MTD screen section.
% of Goal	Shows the percentage when comparing Month To Date (MTD) versus MTD Goal profit dollar amounts.
% of Store	Shows the percentage when comparing Month To Date (MTD) versus MTD store profit dollar amounts.
YTD	Shows the Year To Date (YTD) profit dollar amount. Denoted by the light grey diamond ♦ symbol within the Goals YTD screen section.
LY YTD	Shows Last Years (LY) Year To Date (YTD) profit dollar amount.
% Change	Shows the percentage difference when comparing Year To Date (YTD) versus Last Year (LY) Year To Date (YTD) profit dollar amounts.
YTD Goal	Shows the Year To Date (YTD) profit dollars goal. Denoted by the light blue pointer ► symbol within the Goals YTD screen section.
% of Goal	Shows the percentage when comparing Year To Date (YTD) versus YTD Goal profit dollar amounts.
% of Store	Shows the percentage when comparing Year To Date (YTD) versus YTD store profit dollar amounts.

Number Of Invoices

Heading	Description
MTD	Shows the Month To Date (MTD) number of invoices. Denoted by the light grey diamond ♦ symbol within the Goals MTD screen section.
LY MTD	Shows Last Years (LY) Month To Date (MTD) number of invoices.
% Change	Shows the percentage difference when comparing Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) number of invoices.
MTD Goal	Shows the Month To Date (MTD) number of invoices. Denoted by the light blue pointer ► symbol within the Goals MTD screen section.
% of Goal	Shows the percentage when comparing Month To Date (MTD) versus MTD Goal number of invoices.
% of Store	Shows the percentage when comparing Month To Date (MTD) versus MTD store number of invoices.
YTD	Shows the Year To Date (YTD) number of invoices. Denoted by the light grey diamond ♦ symbol within the Goals YTD screen section.
LY YTD	Shows Last Years (LY) Year To Date (YTD) number of invoices.
% Change	Shows the percentage difference when comparing Year To Date (YTD) versus Last Year (LY) Year To Date (YTD) number of invoices.
YTD Goal	Shows the Year To Date (YTD) number of invoices. Denoted by the light blue pointer ► symbol within the Goals YTD screen section.
% of Goal	Shows the percentage when comparing Year To Date (YTD) versus YTD Goal number of invoices.
% of Store	Shows the percentage when comparing Year To Date (YTD) versus YTD store number of invoices.

Avg Line Items

Heading	Description
MTD	Shows the Month To Date (MTD) average line items. Denoted by the light grey diamond ♦ symbol within the Goals MTD screen section.
LY MTD	Shows Last Years (LY) Month To Date (MTD) average line items.
% Change	Shows the percentage difference when comparing Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) average line items.
MTD Goal	Shows the Month To Date (MTD) average line items goal. Denoted by the light blue pointer ► symbol within the Goals MTD screen section.
% of Goal	Shows the percentage when comparing Month To Date (MTD) versus MTD Goal average line items.
% of Store	Shows the percentage when comparing Month To Date (MTD) versus MTD store average line items.
YTD	Shows the Year To Date (YTD) average line items. Denoted by the light grey diamond ♦ symbol within the Goals YTD screen section.
LY YTD	Shows Last Years (LY) Year To Date (YTD) average line items.

% Change	Shows the percentage difference when comparing Year To Date (YTD) versus Last Year (LY) Year To Date (YTD) average line items.
YTD Goal	Shows the Year To Date (YTD) average line items. Denoted by the light blue pointer ► symbol within the Goals YTD screen section.
% of Goal	Shows the percentage when comparing Year To Date (YTD) versus YTD Goal average line items.
% of Store	Shows the percentage when comparing Year To Date (YTD) versus YTD store average line items.

Percent Returns

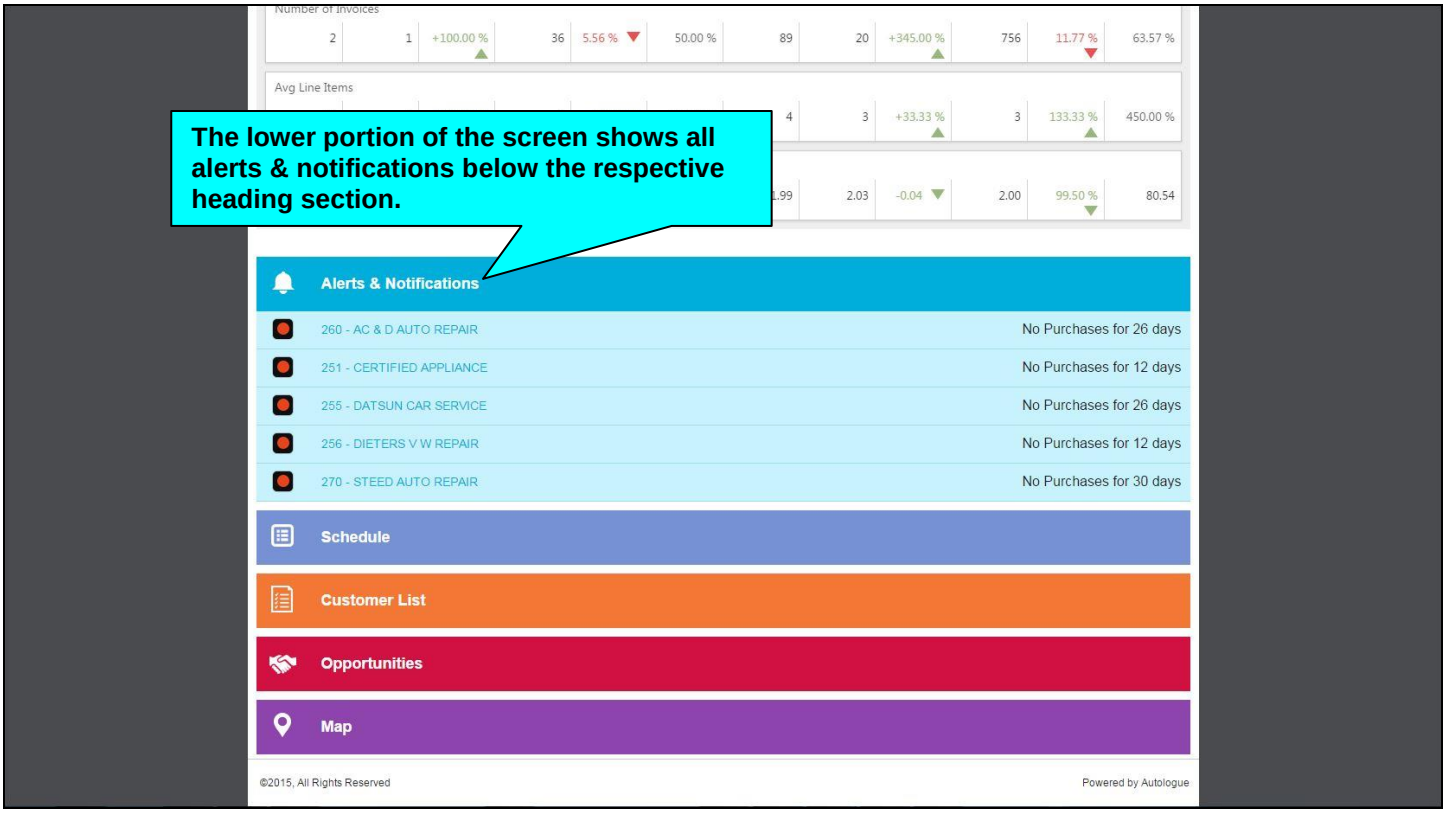
Heading	Description
MTD	Shows the Month To Date (MTD) percent returns. Denoted by the light grey diamond ♦ symbol within the Goals MTD screen section.
LY MTD	Shows Last Years (LY) Month To Date (MTD) percent returns.
% Change	Shows the percentage difference when comparing Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) percent returns.
MTD Goal	Shows the Month To Date (MTD) percent returns. Denoted by the light blue pointer ► symbol within the Goals MTD screen section.
% of Goal	Shows the percentage when comparing Month To Date (MTD) versus MTD Goal percent returns.
% of Store	Shows the percentage when comparing Month To Date (MTD) versus MTD store percent returns.
YTD	Shows the Year To Date (YTD) percent returns. Denoted by the light grey diamond ♦ symbol within the Goals YTD screen section.
LY YTD	Shows Last Years (LY) Year To Date (YTD) percent returns.
% Change	Shows the percentage difference when comparing Year To Date (YTD) versus Last Year (LY) Year To Date (YTD) percent returns.
YTD Goal	Shows the Year To Date (YTD) percent returns. Denoted by the light blue pointer ► symbol within the Goals YTD screen section.
% of Goal	Shows the percentage when comparing Year To Date (YTD) versus YTD Goal percent returns.
% of Store	Shows the percentage when comparing Year To Date (YTD) versus YTD store percent returns.

Award Table

Heading	Description
Counter Person	Displays the name of the counterperson.
Actual Sales	Shows the actual month to date sales amount.
Goal	Shows the month to date sales goal amount.
Difference	Shows the dollar amount difference between the actual month to date sales and goal amounts (Actual Sales – Goal). A positive dollar difference means the counterperson has met their goal.
% Award	Shows the award percentage setup for the counterperson.
Award $$	Shows the calculated award dollar amount. Award dollars are calculated based upon a positive dollar difference amount multiplied by the award percentage. Note: nothing is calculated unless a positive dollar difference amount exists.

Alerts & Notifications

From the counterperson's home screen, if any alerts or notification has been setup and/or met, they will be displayed below the `Alerts & Notifications` heading section as shown:


The lower portion of the screen shows all alerts & notifications below the respective heading section.
Alerts & Notifications
260 - AC & D AUTO REPAIR
No Purchases for 26 days
251 - CERTIFIED APPLIANCE
No Purchases for 12 days
255 - DATSUN CAR SERVICE
No Purchases for 26 days
256 - DIETERS V W REPAIR
No Purchases for 12 days
270 - STEED AUTO REPAIR
No Purchases for 30 days
Schedule
Customer List
Opportunities
Map
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Powered by Autologue

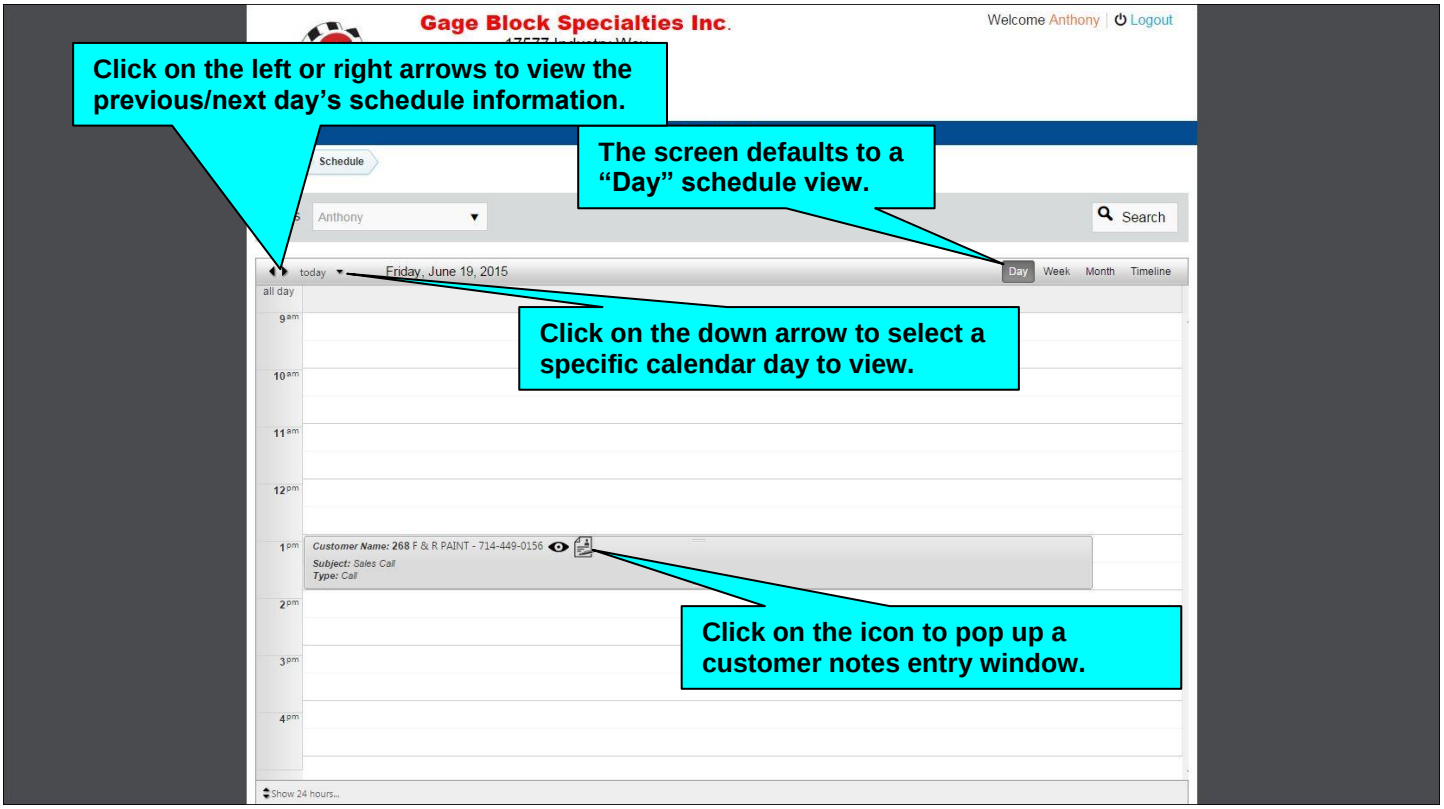
The screen above shows an example of alerts for customers who haven't made a purchase in the past number of days. Notifications are always listed first and alerts second.

Schedule

- From the counterperson's home screen, to view the scheduler, click on the `Schedule` menu bar.

Day Schedule View

By default, the screen will display a daily schedule view as shown:

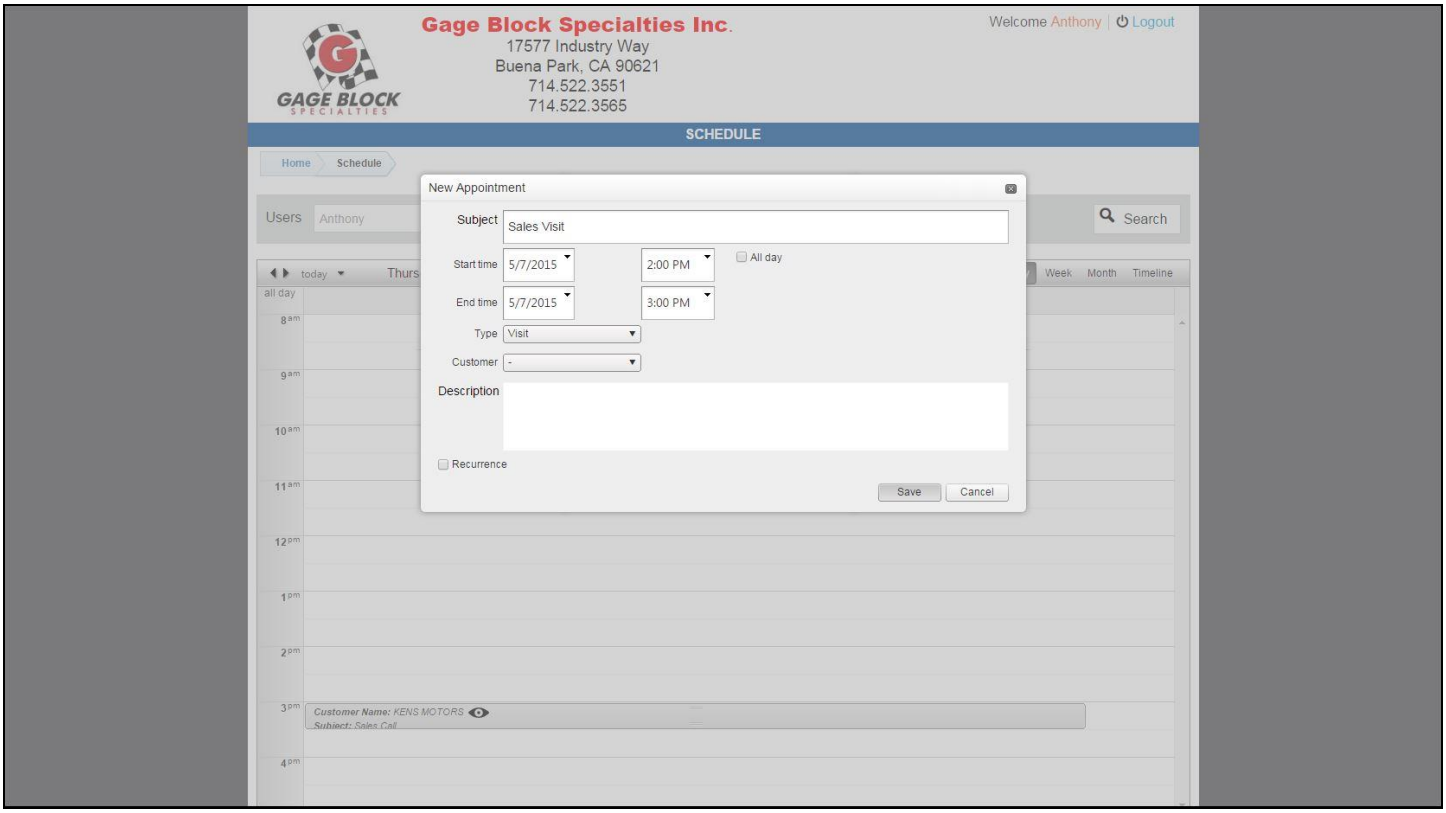


The day schedule view shows all appointments only for the specific day below the `SCHEDULER` heading.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next day's schedule information. Click on the down arrow button to select a specific calendar day to view.

Scheduling A New Appointment

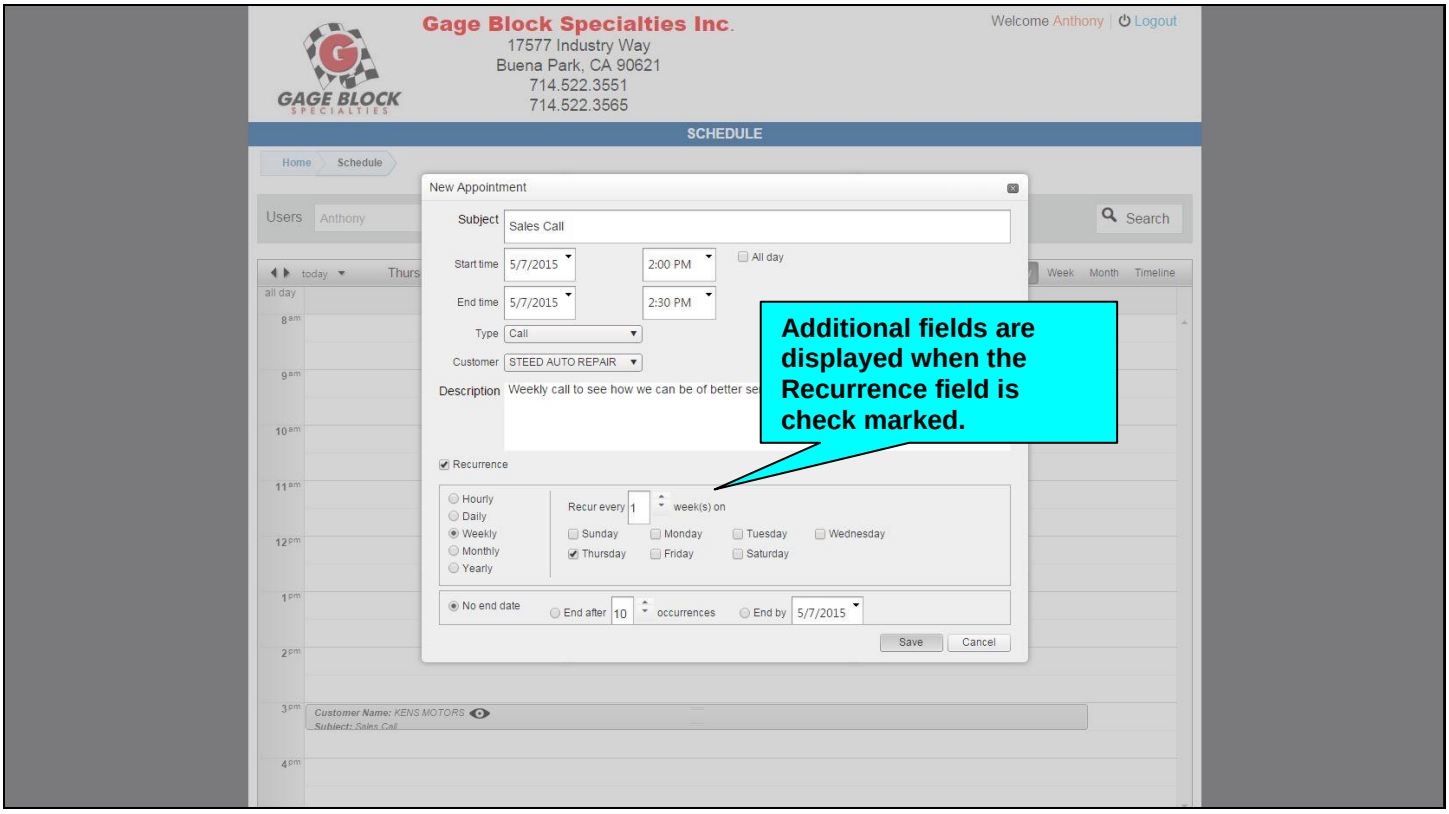
- To schedule a new appointment, double click on a specific time slot shown on the schedule and the following screen will be displayed:



The screen will now display a `New Appointment` pop up window with the `Subject` field defaulted to *Sales Visit* and the appointment `Type` field defaulted to *Visit*.

- With the cursor positioned within the `Subject` field, you have the option to change the default value of *Sales Visit* and press the `<Tab>` key.
- With the cursor positioned within the `Start time` field, you have the option to change the default date and time and value press the `<Tab>` key.
- With the cursor positioned within the `End time` field, you have the option to change the default date and time and value press the `<Tab>` key.
- With the cursor positioned within the `Type` field, you have the option to change the default value of *Visit* by clicking on the down arrow at the end of the field to view a drop down selection list of either *Visit* to *Call*. Click on the desired type and press the `<Tab>` key.
- With the cursor positioned within the `Customer` field, click on the down arrow at the end of the field to view a drop down selection list of all the salespersons customers. Click on the customer you want to set up an appointment for and press the `<Tab>` key.
- With the cursor positioned within the `Description` field, you have the option to enter in a description and press the `<Tab>` key.
- If the appointment is going to be a recurring occurrence, click on the `Recurrence` check box field.

The bottom of the `New Appointment` pop up window will now display some additional field in regards to the recurrence as shown:



By default the `Weekly` and the current day will be set. You have the option to change any of these values to match the frequency of your recurring appointment.

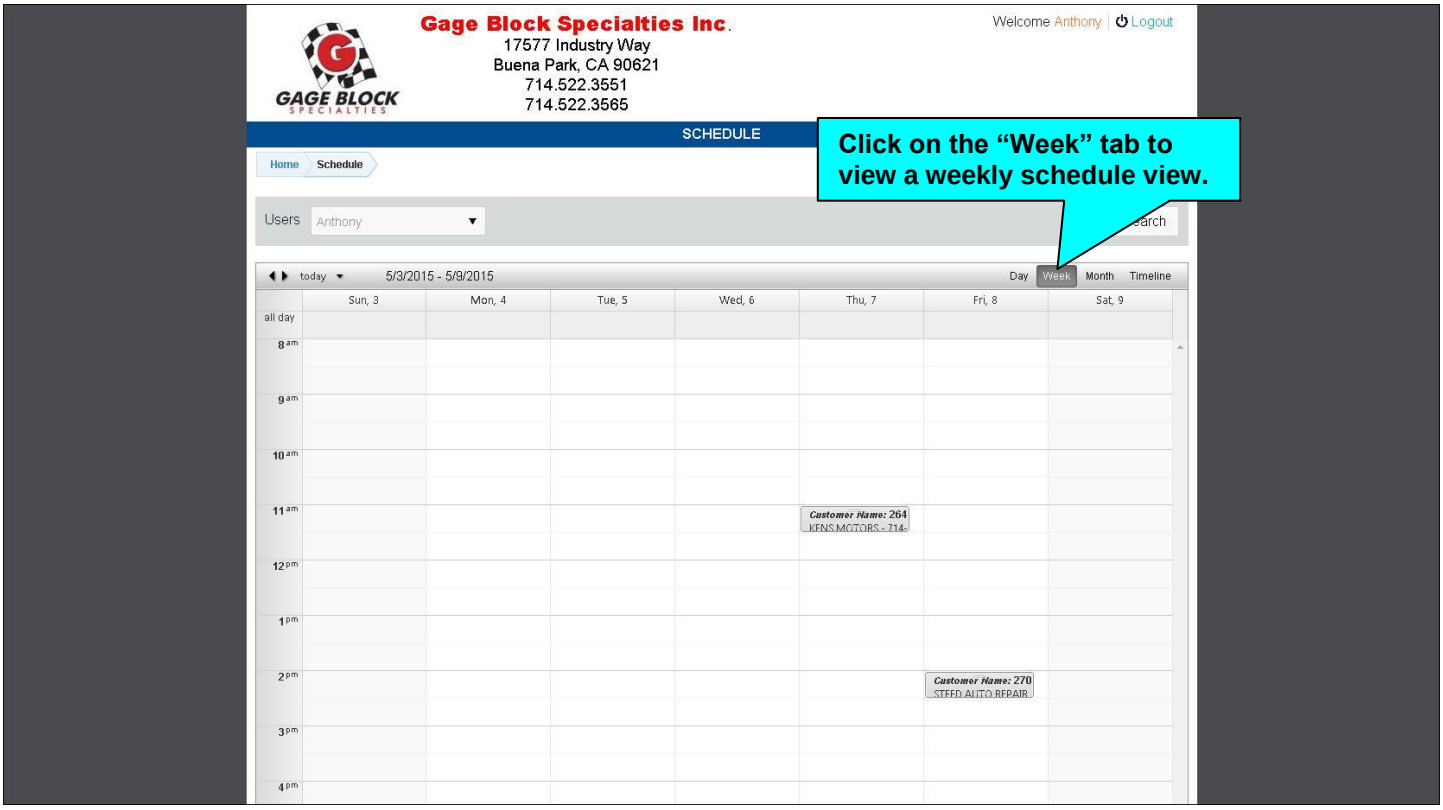
- Once all your fields have been setup, click on the `Save` button.

The appointment will now be displayed within the time slot setup within the `SCHEDULER`.

Week Schedule View

- To have the screen display a weekly schedule view, position the cursor over the `Week` heading tab and click on it.

The screen will be redrawn as shown:



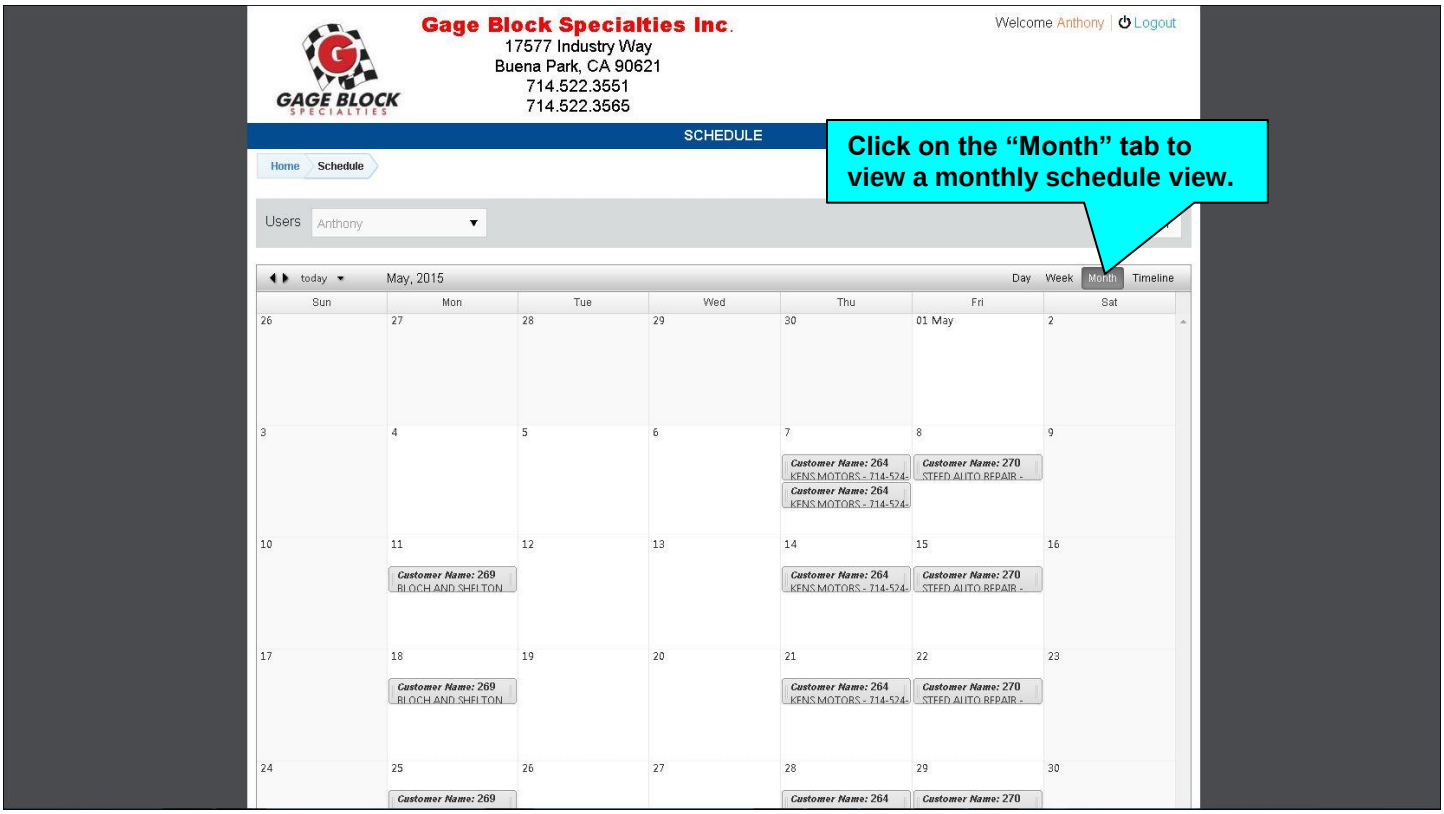
The weekly schedule view shows all appointments only for the current week.

- Click on the left or right arrow buttons of the heading bar to view the previous or next week's schedule information.

Month Schedule View

- To have the screen display a monthly schedule view, position the cursor over the `Month` heading tab and click on it.

The screen will be redrawn as shown:



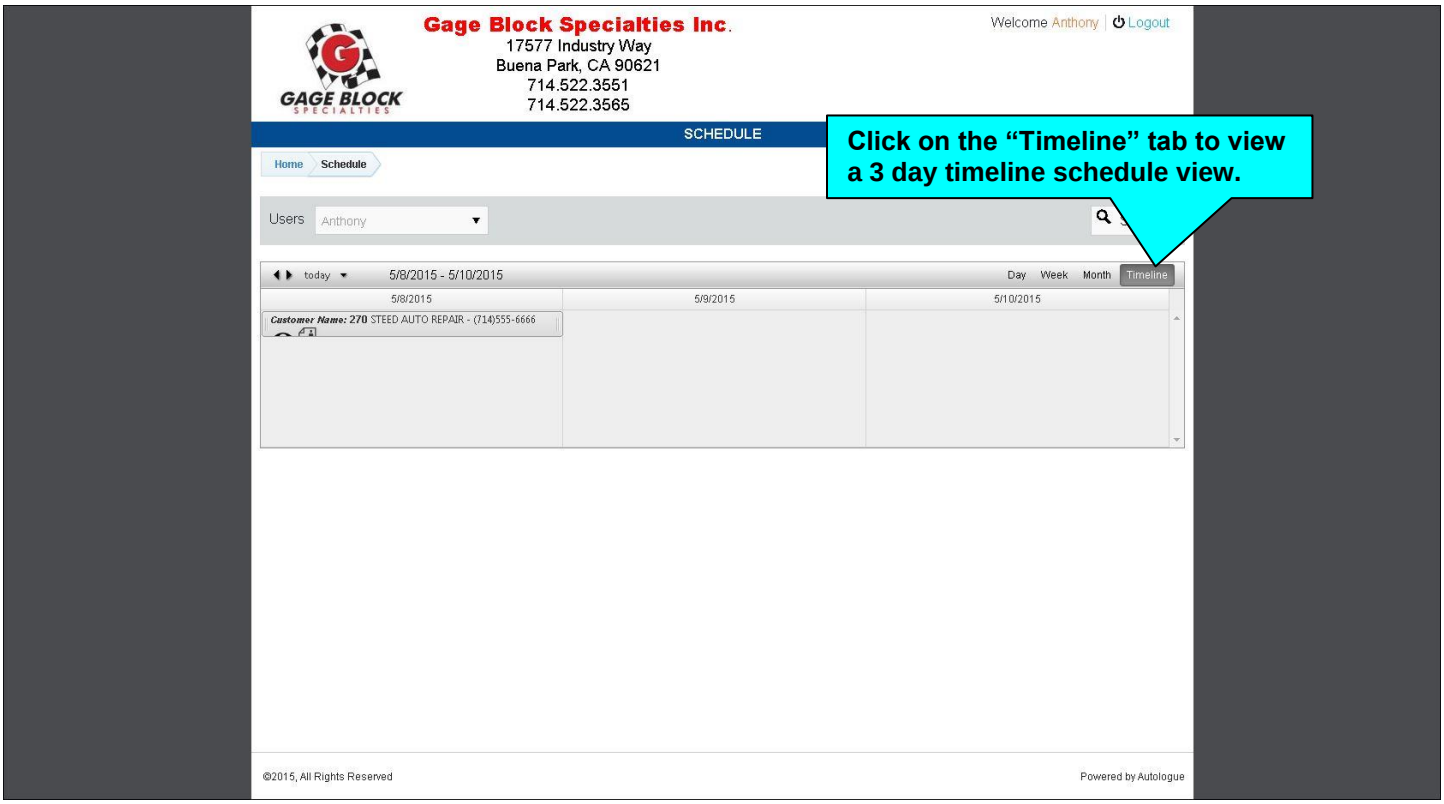
The monthly schedule view shows all appointments only for the current month.

- Click on the left or right arrow buttons of the heading bar to view the previous or next month's schedule information.

Timeline Schedule View

- To have the screen display a three day timeline schedule view, position the cursor over the `Timeline` heading tab and click on it.

The screen will be redrawn as shown:



The timeline schedule view shows all appointments only for a 3 day period.

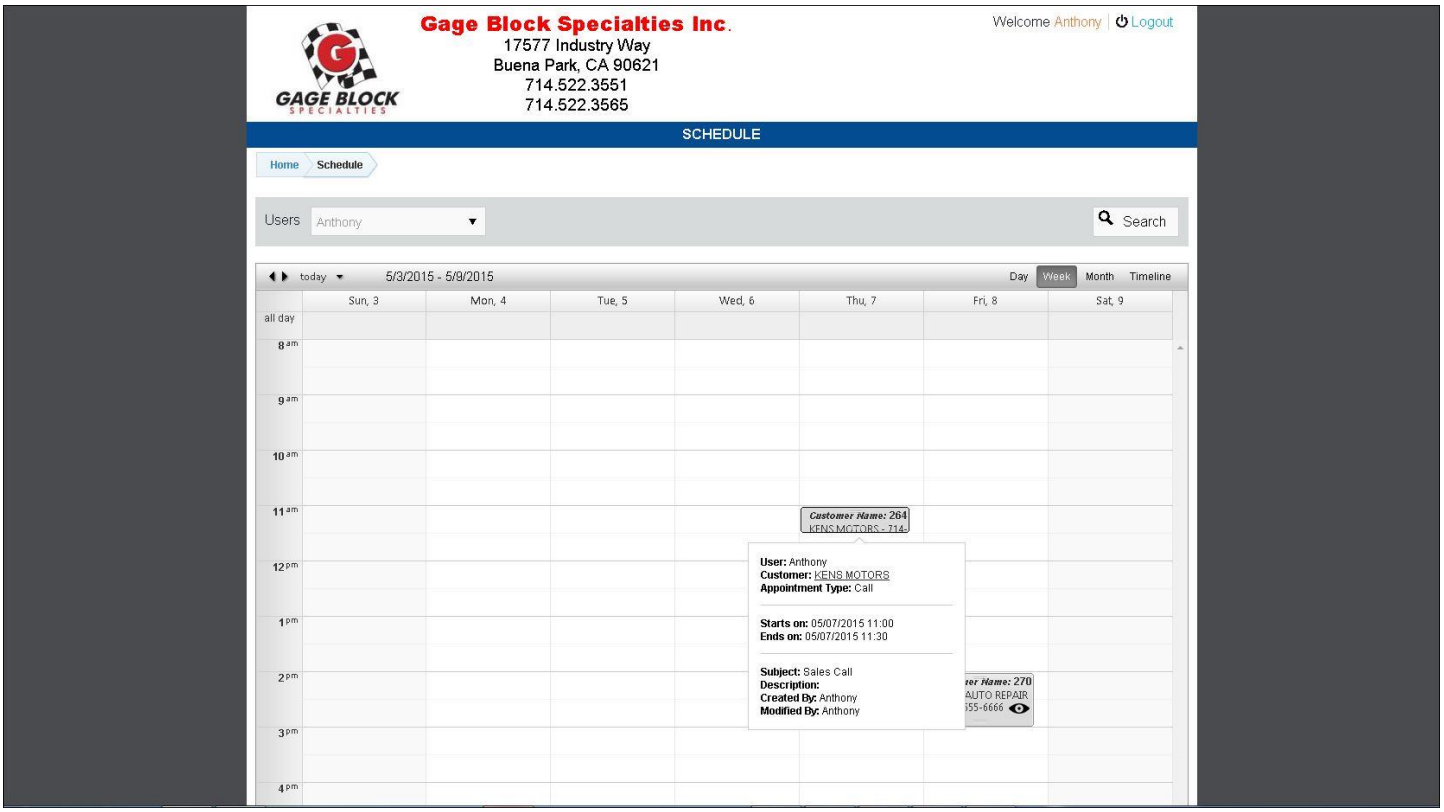
- Click on the left or right arrow buttons of the heading bar to view the previous or next 3 day timeline schedule information.

Viewing Appointment Details

- With the schedule screen displaying appointments in any of the four different views (day, week, month, timeline), you have the ability to view the appointment details by placing the mouse pointer over the grey appointment cell (anywhere except the customer name) and left clicking on it.

☞ **<u>Note:</u> Be sure the mouse pointer stays as an arrow before clicking. If the pointer turns into a finger pointer (☝), it will not display a pop up window of the appointment details!**

The appointment details will pop up on the screen as shown:

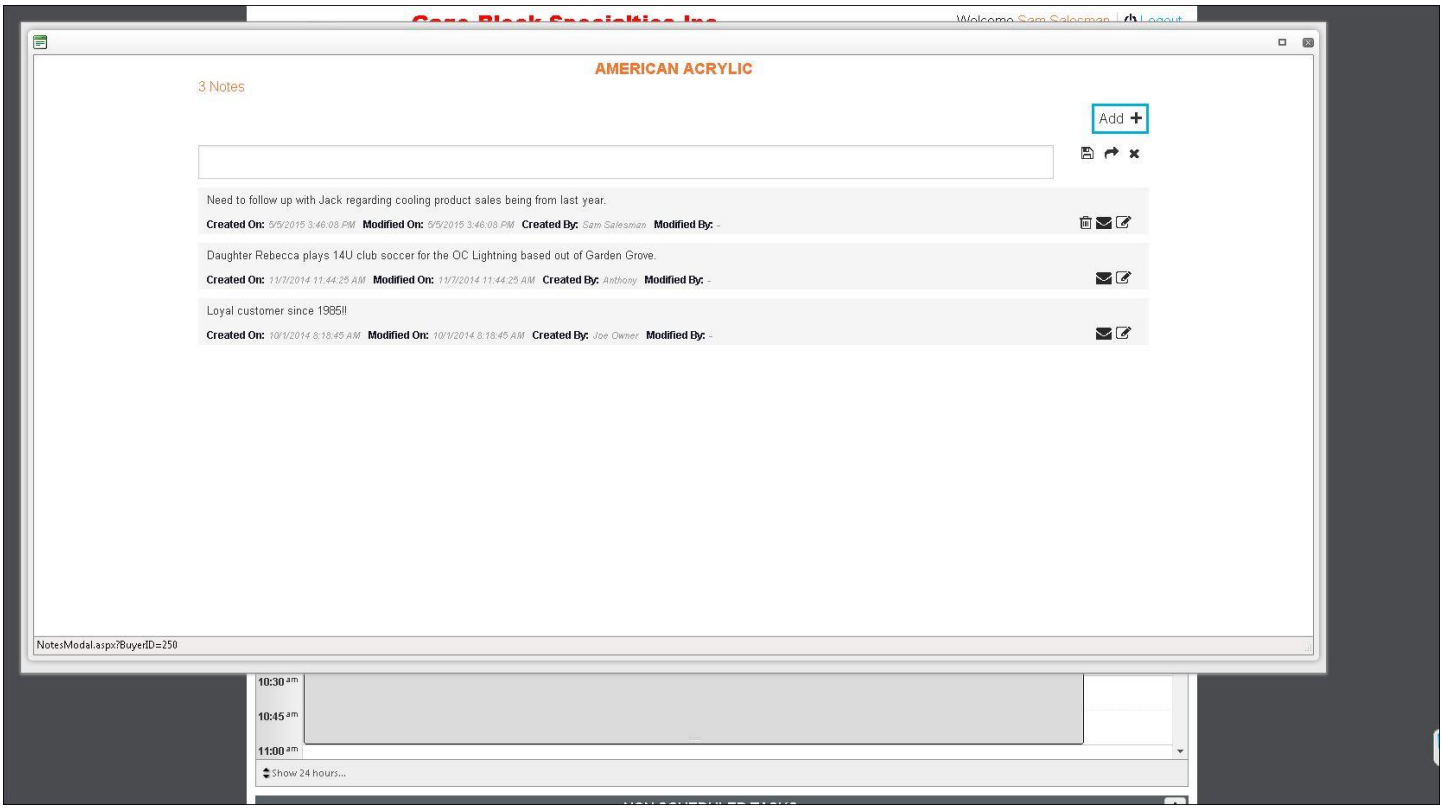


- After viewing the appointment details pop up window, click anywhere else on the screen to remove the pop up window and return back to the scheduler screen.

Entering A Customer Note From An Appointment

- With the schedule screen displaying appointments in the day view, you have the ability to enter a customer note by placing the mouse pointer over the customer notes icon (🗎) and left clicking on it.

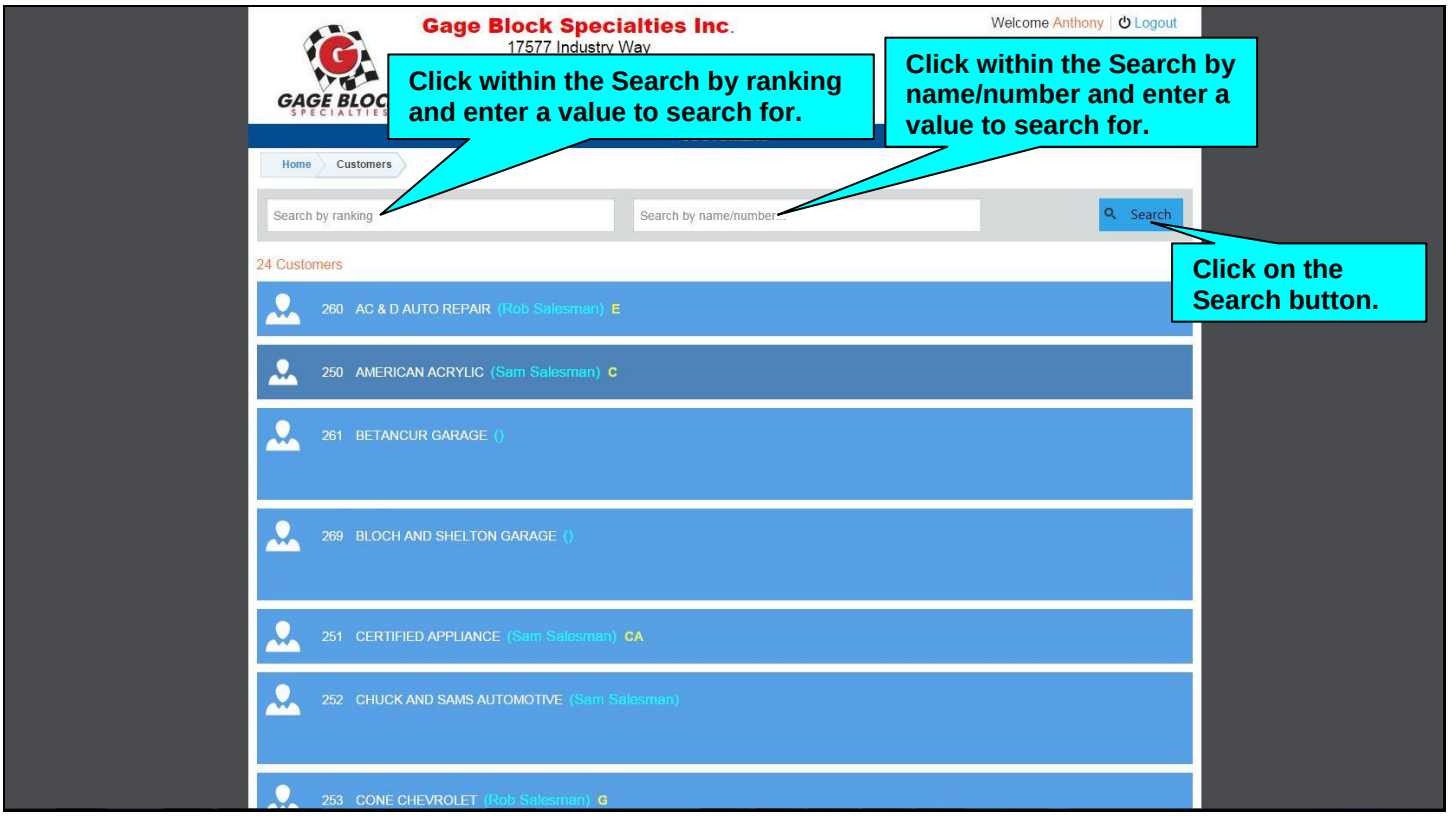
A customer note pop up window will now be displayed on the screen and will display any note entry information for the customer as shown:


AMERICAN ACRYLIC
3 Notes
Add +
Need to follow up with Jack regarding cooling product sales being from last year.
Created On: 5/5/2015 3:46:08 PM Modified On: 5/5/2015 3:46:08 PM Created By: Sam Salesman Modified By: -
Daughter Rebecca plays 14U club soccer for the OC Lightning based out of Garden Grove.
Created On: 11/7/2014 11:44:25 AM Modified On: 11/7/2014 11:44:25 AM Created By: Anthony Modified By: -
Loyal customer since 1985!!
Created On: 10/1/2014 8:18:45 AM Modified On: 10/1/2014 8:18:45 AM Created By: Joe Owner Modified By: -
NotesModal.aspx?BuyerID=250
10:30 am
10:45 am
11:00 am
Show 24 hours...

- A note can be added by clicking on the (Add ✚) button, then clicking within the blank field that is now displayed above all the previous notes information, enter in the new notes information and then clicking on the Save (🖬) icon to save the entered note. You also have the option to both save the entered note and have it emailed by clicking on the Save and Email (➦) icon.
- Existing note entries display the actual note, the creation/last modification dates, and the names of who created/modified the note entry. An existing note entry can be modified by clicking on the edit note (🖉) icon. A note can be emailed by clicking on the envelope (✉) icon. Clicking on the trash can (🗑) icon will delete the note entry.
- Click on the close (☒) icon to close the customer notes pop up window and you will be returned to the schedule screen.

Customer List

- From the counterpersons home screen, to access a listing of all customer accounts, click on the `Customer List` button and the following screen will be displayed:


Gage Block Specialties Inc.
17577 Industry Way
Welcome Anthony | Logout
Click within the Search by ranking and enter a value to search for.
Click within the Search by name/number and enter a value to search for.
Home
Customers
Search by ranking
Search by name/number
Search
Click on the Search button.
24 Customers
260 AC & D AUTO REPAIR (Rob Salesman) E
250 AMERICAN ACRYLIC (Sam Salesman) C
261 BETANCUR GARAGE ()
269 BLOCH AND SHELTON GARAGE ()
251 CERTIFIED APPLIANCE (Sam Salesman) CA
252 CHUCK AND SAMS AUTOMOTIVE (Sam Salesman)
253 CONE CHEVROLET (Rob Salesman) G

By default, all customers are displayed on the screen. Besides each customer name that is listed will be their assigned salesperson (shown in parenthesis) and ranking code (shown in yellow).

- You have the ability to filter the customer list by entering specific values within the `Search by ranking` and/or `Search by name/number` fields and then clicking on the `Search` button.

Customer Navigation

- From the *CUSTOMERS* home screen and the list of customers being displayed, click on the customers blue bar and the following screen will be displayed:

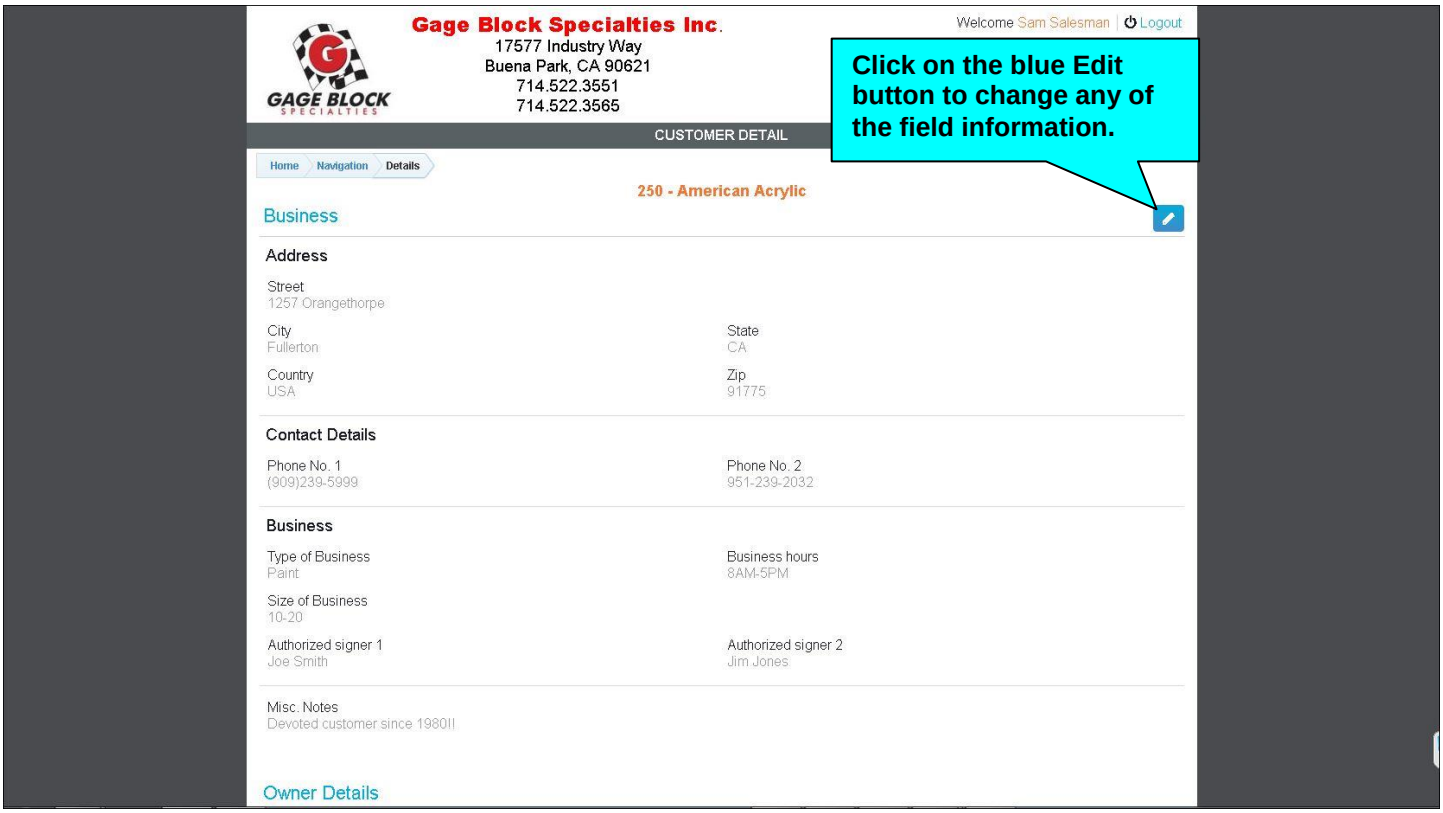
The *CUSTOMER NAVIGATION* screen will now be displayed for the selected customer (whose customer number, name and phone number is displayed above the colored menu blocks).

Here the counterperson has the ability to perform the following:

• View/Add additional business & personal information for the customer (About Customers)	• Automatically login to ePartConnection as the customer
• Automatically login to eOffice as the customer	• View a sales dashboard (Business Intelligence)
• View/Add customer notes information	

About Customers

- From the *CUSTOMER NAVIGATION* screen, click on the `About Customers` colored menu block and the following screen will be displayed:

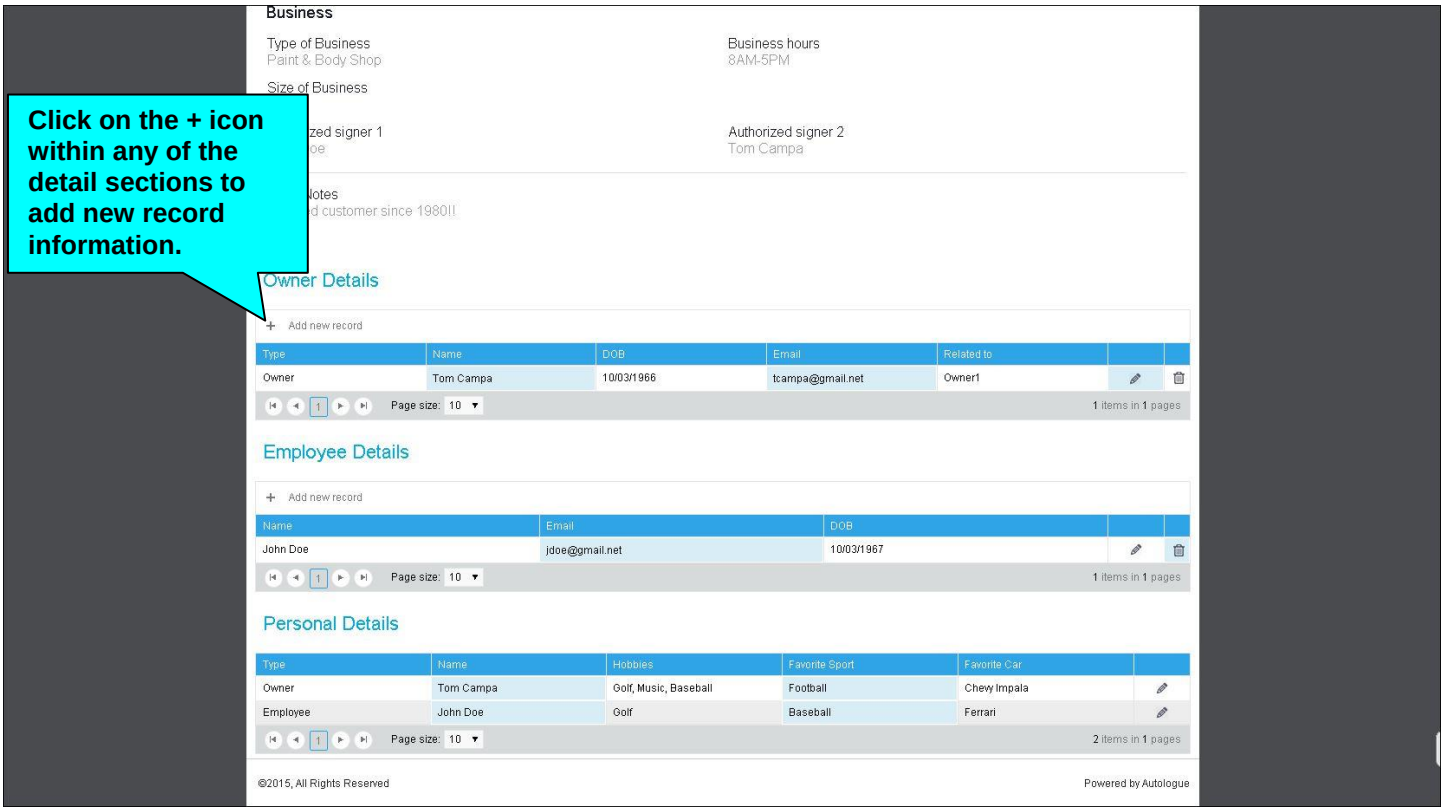


The *CUSTOMER DETAIL* screen will be displayed and will be displaying the entered business information (address, phone numbers, business type/hours/size, authorized signers and notes) for the selected customer.

- To edit any of the existing business information, click on the blue edit (✎) icon, and then click within any of the fields within the *Contact Details* & *Business* sections and make your changes and then click on the blue save button.

☞ **<u>Note:</u> The Phone No. 1 field cannot be edited; It can only be changed within the *ePart Setup – Customer Options*.**

- At the bottom of the screen are *Owner/Employee/Personal Details* heading sections. These sections are used to enter in your customer's owners as well as their employees CRM information:



- To add CRM record information within any of the listed sections, click on the (✚) symbol within their respective detail sections and the screen will now display a new row of blank entry fields. Enter in the details information (type, name, date of birth, email, relationship, hobbies, favorite sport, favorite car) and then click on the (✓) symbol to save the entered information.
- To edit CRM record information within any of the listed sections, click on the (✎) symbol besides the row of fields information and the fields will now be shown as entry fields. Edit any of the details information and then click on the (✓) symbol to save the updated information.

ePartConnection

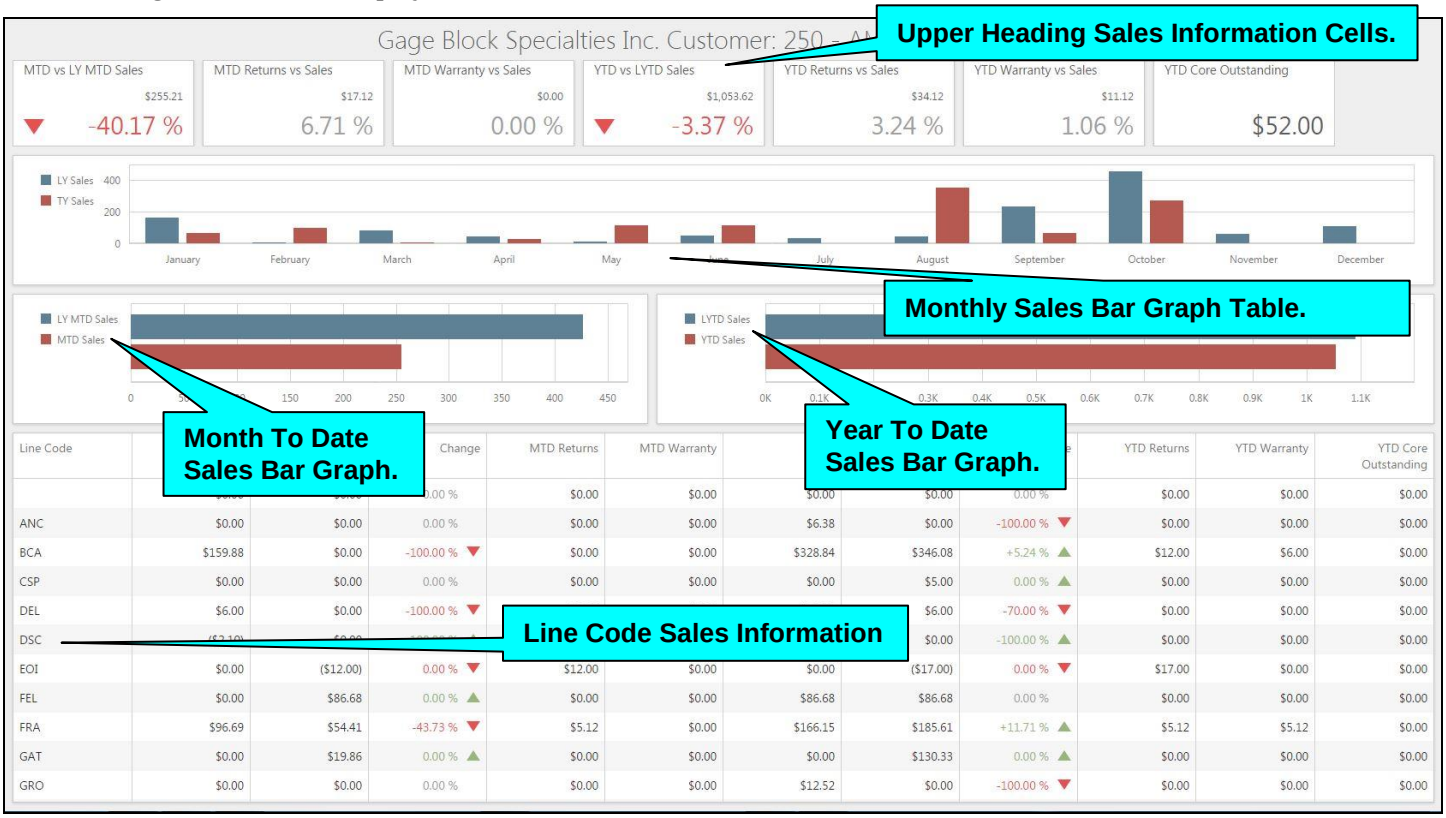
- From the CUSTOMER NAVIGATION screen, click on the ePartConnection colored menu block and a new webpage tab will be opened and you will be automatically logged into the customer's account within ePartConnection.

eOffice

- From the CUSTOMER NAVIGATION screen, click on the eOffice colored menu block and a new webpage tab will be opened and you will be automatically logged into the customer's account within eOffice.

Business Intelligence

- From the *CUSTOMER NAVIGATION* screen, click on the `Business Intelligence` colored menu block and the following screen will be displayed:


Upper Heading Sales Information Cells.
Monthly Sales Bar Graph Table.
Month To Date Sales Bar Graph.
Year To Date Sales Bar Graph.
Line Code Sales Information

This screen is a graphical "sales dashboard" of the customers sales from the past year on up through the current date. It displays a variety of graphed sales figures as well as dollar values for the various types of returns (core/inventory/warranty). It also shows the percentage changes (positive/negative) based up comparisons from last year versus this year sales. The screen is broken up in 4 sections:

1. Upper Heading Sales Information Cells
2. Monthly Sales Bar Graph Table
3. Month/Year To Date Sales Bar Graphs
4. Line Code Sales Information

Upper Heading Sales Information Cells Section

Heading	Description
MTD vs LY MTD Sales	Shows the Month To Date (MTD) sales dollar amount and the percentage difference when compared to Last Year (LY) Month To Date (MTD) sales dollar amount. The small dollar amount displayed is the current month to date sales. The large percentage figure displayed will either show in red if the percentage is down (denoted by the red down arrow) or in green if the percentage is up (denoted by the green up arrow). To view the Last Year (LY) Month To Date (MTD) sales dollar amount, hover over either of the bar graphs within the Month To Date Sales Bar graph section of the screen.

MTD Returns vs Sales	Shows the Month To Date (MTD) inventory returns dollar amount and its percentage when compared to the Month To Date sales dollar amount. The small dollar amount displayed is the current month to date inventory returns sales. The large grey percentage figure is the return percentage (MTD Returns ÷ MTD Sales*100).
MTD Warranty vs Sales	Shows the Month To Date (MTD) warranty returns dollar amount and its percentage when compared to Month To Date sales dollar amount. The small dollar amount displayed is the current month to date warrant returns sales. The large grey percentage figure is the warranty return percentage (MTD Warranty ÷ MTD Sales*100).
YTD vs LYTD Sales	Shows the Year To Date (YTD) sales dollar amount and the percentage difference when compared to Last Year To Date (LYTD) sales dollar amount. The small dollar amount displayed is the current year to date sales. The large percentage figure displayed will either show in red if the percentage is down (denoted by the red down arrow) or in green if the percentage is up (denoted by the green up arrow). To view the Last Year To Date (LYTD) sales dollar amount, hover over either of the bar graphs within the Year To Date Sales Bar graph section of the screen.
YTD Returns vs Sales	Shows the Year To Date (YTD) inventory returns dollar amount and its percentage when compared to the Year To Date sales dollar amount. The small dollar amount displayed is the current year to date inventory returns sales. The large grey percentage figure is the return percentage (YTD Returns ÷ YTD Sales*100).
YTD Warranty vs Sales	Shows the Year To Date (YTD) warranty returns dollar amount and its percentage when compared to Year To Date sales dollar amount. The small dollar amount displayed is the current year to date warrant returns sales. The large grey percentage figure is the warranty return percentage (YTD Warranty ÷ YTD Sales*100).
YTD Core Outstanding	Shows the Year To Date (YTD) outstanding cores dollar amount. This represents the amount of cores charged for and not yet returned.

Monthly Sales Bar Graph Table Section

The second section of the screen, just below the upper heading cells section, displays the monthly sales bar graph data for current and last year's sales dollars.

☞ **Note: A pop up window showing the exact dollar figures is automatically displayed whenever you "hover" the mouse pointer over any of bar code graphs.**

Month/Year To Date Sales Bar Graphs Section

The third section of the screen, just below the monthly sales bar graph section, displays the month and year to date sales dollars versus last month and current sales dollars to date.

☞ **Note: These figures are based on "to date" which means if we are 15 days into the current month and 180 days into the current year, the LY (last year) MTD (month to date) and YTD (year to date) sales figures are based upon those day amounts.**

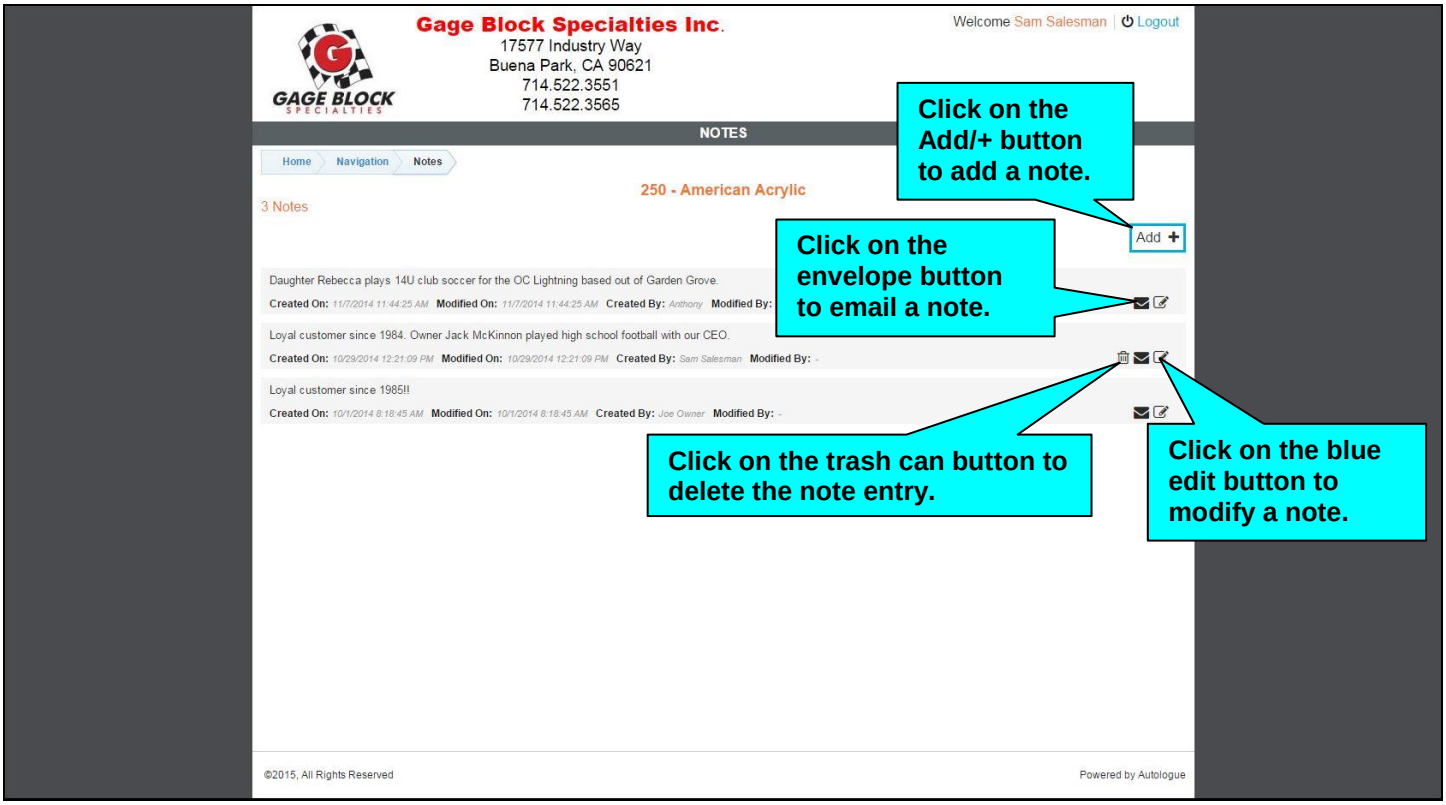
Line Code Sales Information Section

Heading	Description
Line Code	The line code of the parts sold to the customer.
LY MTD	Shows the Last Year (LY) Month To Date (MTD) sales dollar amount for the line code.
MTD	Shows the Month To Date (MTD) sales dollar amount for the line code.
Change	Shows the percentage difference when comparing the Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) sales dollar amounts.
MTD Returns	Shows the Month To Date (MTD) inventory returns dollar amount.
MTD Warranty	Shows the Month To Date (MTD) warranty returns dollar amount.
LYTD	Shows the Last Year To Date (LYTD) sales dollar amount for the line code.
YTD	Shows the Year To Date (LYTD) sales dollar amount for the line code.

Change	Shows the percentage difference when comparing the Year To Date (YTD) versus Last Year To Date (LYTD) sales dollar amounts.
YTD Returns	Shows the Year To Date (YTD) inventory returns dollar amount.
YTD Warranty	Shows the Year To Date (YTD) warranty returns dollar amount.
YTD Core Outstanding	Shows the Year To Date (YTD) outstanding cores dollar amount. This represents the amount of cores charged for and not yet returned.

Notes

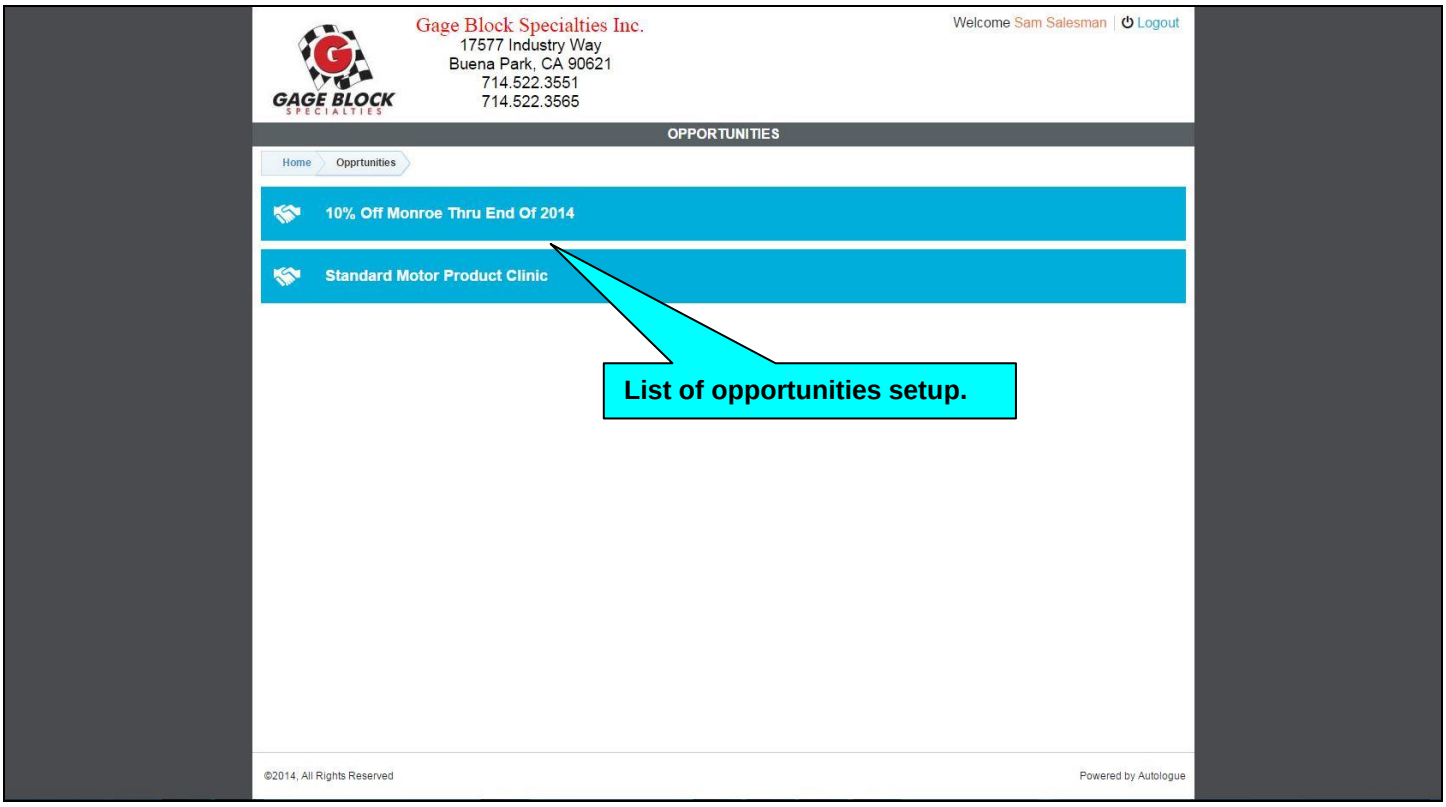
- From the *CUSTOMER NAVIGATION* screen, click on the `Notes` colored menu block and the screen will display any note entry information for the customer as shown:


Gage Block Specialties Inc.
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565
Welcome Sam Salesman | Logout
NOTES
Home
Navigation
Notes
250 - American Acrylic
3 Notes
Add +
Daughter Rebecca plays 14U club soccer for the OC Lightning based out of Garden Grove.
Created On: 11/7/2014 11:44:25 AM Modified On: 11/7/2014 11:44:25 AM Created By: Anthony Modified By:
Loyal customer since 1984. Owner Jack McKinnon played high school football with our CEO.
Created On: 10/29/2014 12:21:09 PM Modified On: 10/29/2014 12:21:09 PM Created By: Sam Salesman Modified By: -
Loyal customer since 1985!!
Created On: 10/1/2014 8:18:45 AM Modified On: 10/1/2014 8:18:45 AM Created By: Joe Owner Modified By: -
©2015, All Rights Reserved
Powered by Autologue
Click on the Add/+ button to add a note.
Click on the envelope button to email a note.
Click on the trash can button to delete the note entry.
Click on the blue edit button to modify a note.

The note entry displays the actual note, the creation/last modification dates, and the names of who created/modified the note entry. A note can be added by clicking on the (Add ✚) button. The existing note entry can be modified by clicking on the edit note (✎) icon. A note can be emailed by clicking on the envelope (✉) icon. Clicking on the trash can (🗑) icon will delete the note entry.

Opportunities

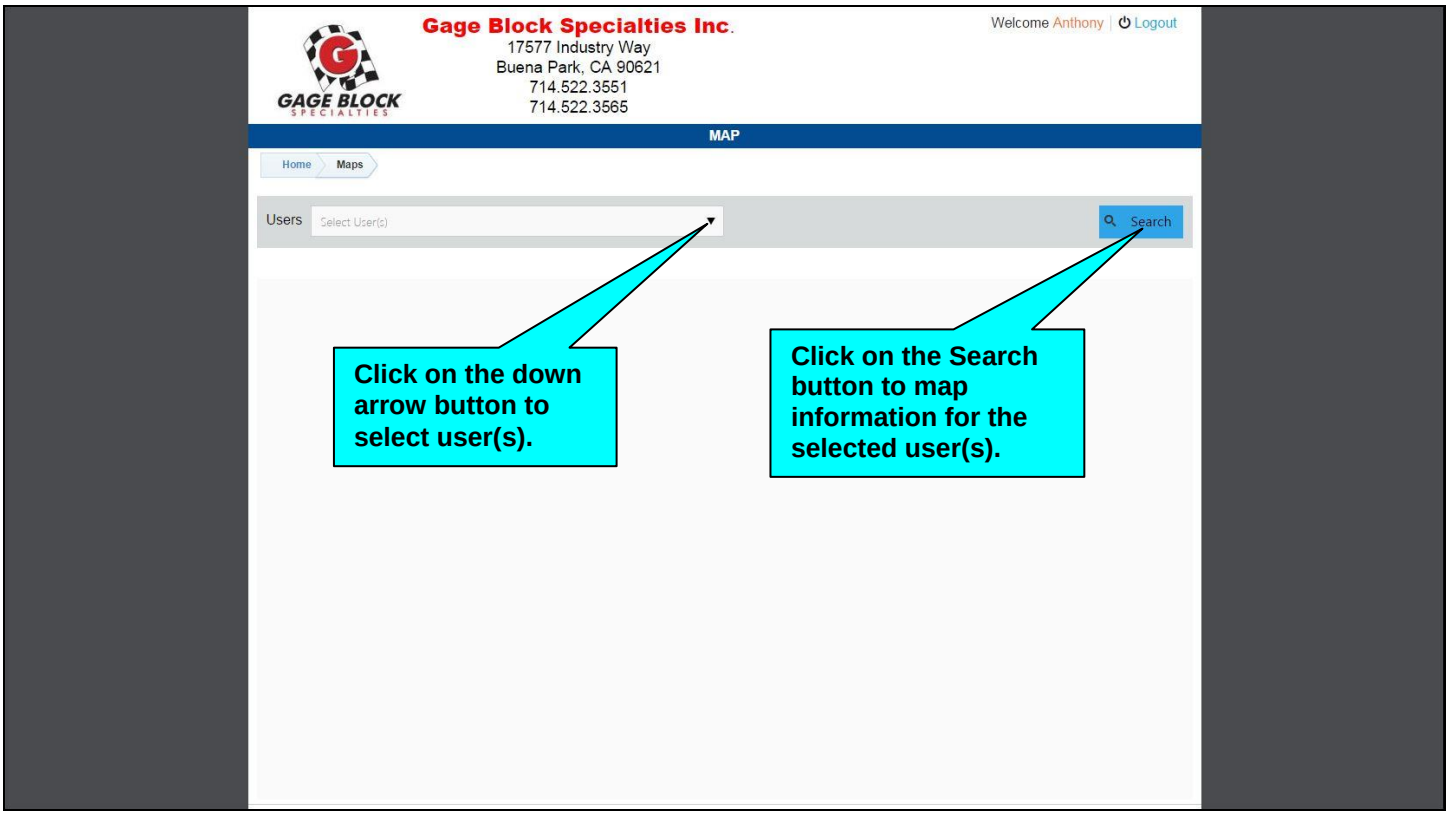
- From the counterpersons home screen, to access a listing of opportunities that have been setup by management, click on the `Opportunities` button and the following screen will be displayed:



The opportunities can be reminders of important information or can be links to web pages. This information is setup within the *Manage opportunities* section of the *Setup ePartConnection* webpage.

Map

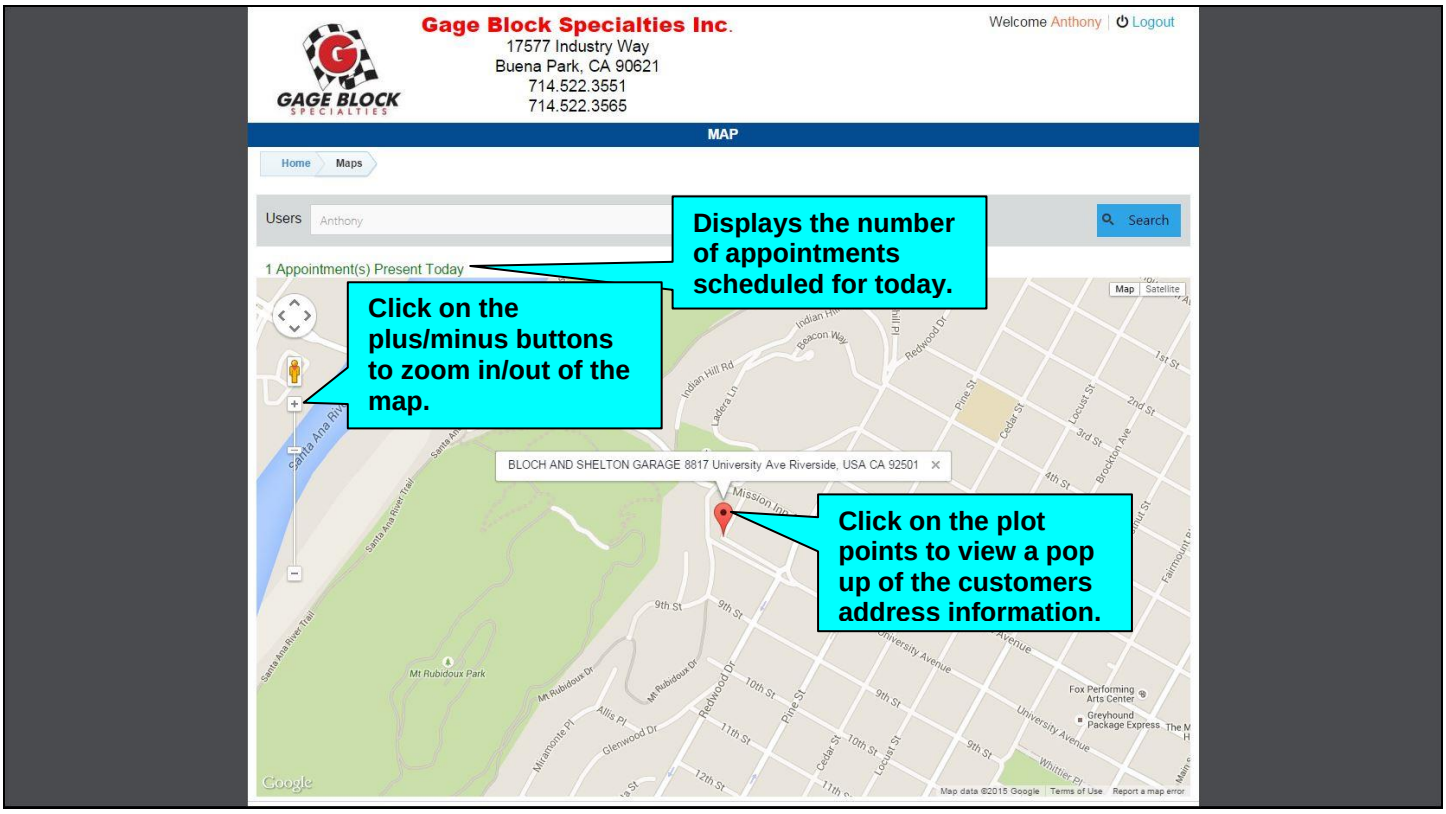
- From the counterpersons home screen, to view a map of scheduled appointments for the current day, click on the `Map` button and the following screen will be displayed:



By default, the screen will be blank because no users will be selected.

- To select User(s), click on the down arrow symbol at the end of the Users entry field and a drop down selection list of all users will be displayed. Check mark all the specific user(s) you want to display map information for and then click on the blue Search button.

If there were scheduled appointments for the day for the selected users, the screen will display a map plotting the locations of the customers who are scheduled for appointments:



The top of the map will display the number of appointments that are scheduled for the current day.

- Clicking on the plus (+) will zoom in or on the minus (-) will zoom out.
- Click on any of the plot points to see a pop up window that shows the Customer's name and address information.